

## Offboarding Checklist

**Employee Name:**

**Term Date:**

**Last Payroll Check Date:**

**Severance Check Date:**

### Notified of Termination

- ☐ Receive written resignation notice signed by employee and manager/supervisor
- ☐ Send termination notification and effective date to:
  - ☐ Electronic ticketing system
  - ☐ Payroll
  - ☐ Finance - Claims (to remove any credit card information)
  - ☐ Facilities (to remove building access)
  - ☐ Information Technology (to remove computer and systems access)
  - ☐ Department Technology Administrator (to remove additional and/or division systems access)
- ☐ Review collective bargaining agreement or personnel policies for financial severance information (PTO, sick, vacation payout and eligibility provisions, etc.)
- ☐ Hold Termination Meeting/Exit Interview and provide below information:
  - ☐ Benefits end date
  - ☐ Advise of COBRA eligibility and COBRA process
  - ☐ Review final pay information – last payroll check date and when severance will be processed
  - ☐ If applicable, review HSA account details including fees the terminating employee may be responsible for upon termination
  - ☐ Provide PERA contact information
  - ☐ Sign off on PERA Termination Form (generally employee will provide this to the employer if they plan on drawing PERA)
  - ☐ Provide deferred compensation plan contact information

### Prior to Termination

- ☐ **Terminate the following benefits:**
  - ☐ Medical if applicable
  - ☐ Dental if applicable
  - ☐ HRA if applicable
  - ☐ FSA if applicable
  - ☐ VEBA if applicable

- ☐ Vision if applicable
- ☐ Life Insurance and other post tax benefits if applicable

☐ **Add to the following systems (if applicable):**

- ☐ Post-Employment Health Care Savings Plan (PEHCSP)
- ☐ COBRA Vendor Site

☐ **Last Day of Employment**

*Review County property and collect all items from terminating employee*

- ☐ ID/facilities access badge
- ☐ Keys (building, office, desk, county vehicle)
- ☐ Credit card(s)
- ☐ Computer, laptop, mobile device, cell phone
- ☐ Other county-issued equipment or property: \_\_\_\_\_
- ☐ If applicable, send COBRA paperwork via postal mail. Address envelope(s) to employee and to qualified dependents

**Post Termination**

- ☐ Process severance and send information to Finance/Payroll
- ☐ Create financial claim if severance is distributed to a third party, such as a Post-Employment Health Care Savings Plan