



Employee Separation Checklist

Instructions

When an employee notifies their manager of their intent to resign, the manager emails a copy of this checklist to the employee. If the employee notifies HR first, then HR will email a copy of the checklist to the supervisor and employee. The employee, supervisor and HR Specialist collaborate to complete the checklist. When a copy of the completed checklist is returned to HR it will be placed in the employee's personnel file.

Employee Responsibilities

- Notify manager - submit a letter of resignation that includes last day of employment (resignations only)
- Discuss plans to take time off with manager
- Ensure all paid time off has been entered into UKG
- Verify time card in UKG by last day
- Ensure home mailing address is correct in UKG
- Add alternate email in UKG (an exit survey will be sent to this address)
- Reconcile company credit card purchases and submit expense reports
- Return all PROVAIL property to manager before last day of employment

Manager Responsibilities

- Go over separation checklist with employee to ensure they understand their responsibilities
- Complete Separation Form and submit to Human Resources with resignation letter (hr@provail.org)
- Collect PROVAIL property before the employee's last day (building access cards, keys, credit/gas card, electronic equipment (laptop, chrome book, etc.)
- Notify HR if any property was not returned; HR can deduct value of the missing property from the employee's final paycheck if notified at least 8 days prior to last paycheck
- Return electronic equipment to KDH or front desk at HQ
- Notify Accounting (accounting@provail.org) to deactivate credit card
- Obtain/review final credit card report and receipts for purchases through the employee's last day
- Obtain/review final reimbursement requests for processing

Employee signature: _____ Date: _____

Manager signature: _____ Date: _____



HR Responsibilities

- Update UKG with employment end date; process final paycheck and vacation payouts
- Notify KDH - provide direction to deactivate the employee's email and manage electronic documents as indicated on the Separation Form
- Send exit survey and term letter
- Update UKG with employment end date; process final paycheck and vacation payouts
- Notify KDH - provide direction to deactivate the employee's email and manage electronic documents as indicated on the Separation Form
- Remove employee from HQ printers
- If applicable, remove mailbox from headquarters
- Send term letter

If employee was a manager:

- Delegate temporary responsibilities for timesheet/time off approval
- Transfer delegation to new employee once a permanent hire is made.

Accounting/IT

- Deactivate the employee's access to email and other program/applications and manage electronic documents as indicated on the Separation Form
- Close credit card line(s)
- If the employee does not return their assigned PROVAIL property, provide HR with the value to withhold from the employee's paycheck.