



Employee Offboarding Checklist

Instructions: The offboarding checklist is to be completed for every employment separation.

Part 1 to be completed, signed and dated by Department Head. When completed, email to HR/Finance/TSO (Amelia) **within 24 hours' notice of separation.** *Please notify HR prior to any involuntary termination.*

Part 2 will be completed, signed and dated by HR/Finance/TSO (Amelia). Completed, executed copy will be retained in employee's file.

PART 1: To be completed by Department Head

Employee Name: _____ **Department:** _____

Civil Service Title: _____ **Status:** _____

Separation Date: _____

Type of Separation

Voluntary Resignation:

Received employee's notice of resignation on ____/____/____ Written Verbal

Involuntary Termination on ____/____/____

Retirement effective on ____/____/____

Notes:

Items to be completed by effective date of separation:

If the date of separation is to take place in the future, please send an email to IT to schedule the disabling of various accounts/access points. Take note of remaining tasks and email HR that all items have been completed within one week of effective separation date.

Facilities/Office Manager

Contacted IT to disable e-mail account.



- Removed employee's name from e-mail group distribution lists; internal/office phone list; website and building directories.
- Contacted IT to disable computer access (VDI, VPN, etc).
- Contacted IT to re-assign phone extension/voicemail.
- Disabled security codes, if necessary.
- Cleaned work area and removed personal belongings.
- Collected the following items:
 - Keys (office building desk file cabinets Town vehicle(s) other)
 - Building access fob(s)
 - Town-issued cell phone
 - Electronic systems: Laptop / Computer / Monitor
 - Uniform(s), PPE
 - Tools
 - Other _____

Town Board Meeting

- (Expected) Town Board action on ____/____/____

PART 2: To be completed by HR/Finance/TSO

Type of Separation

- (In)voluntary Termination:
 - Provided employee with termination letter, including Unemployment Notice.
 - Exit interview (as applicable)
contacted on ____/____/____ completed on ____/____/____
- Retirement:
 - Received employee's Retirement Notice from NYSLRS.
 - Provided employee with retirement letter from TWS.



Benefits

- Provided employee with termination/continuation of employment insurance benefit information (COBRA, life insurance, supplemental insurance, etc.)
- Checked FSA/HSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.
- Checked dependent care FSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.
- Checked accrual balances and informed employee of any remaining accrual balances for payout and how it will be processed at termination of employment.
- Informed employee about retirement plan account options.

Compensation

- Provided notice of policy regarding any outstanding balances for money owed to company (e.g., educational loans/pay advances).
- Notified Payroll to process final paycheck.
- Payroll to calculate and process payout of unused but earned accrual amounts due to the employee. Check payment date ____/____/____
- Deactivated status in Payroll system.

Contracts/Legal

- Provided written notice to employee of any legal obligations that continue post-employment (e.g., noncompete/confidentiality agreements/employment contracts).

Records

- Pulled personnel file to be stored with terminated employee files.
- Pulled Form I-9 to be stored with terminated employees' I-9s.
- Obtained written authorization from employee to respond to employment verification requests.
- Deactivated status in time and attendance system.

Completed by:

Department Head _____ Date: _____

Human Resources _____ Date: _____

Finance _____ Date: _____

Supervisor's Office _____ Date: _____