**Preparation for Employment Transition**

**Before Employee’s Last Day of Employment**

**Human Resources**

* Prepare exit letter and nondisclosure agreement
* Prepare COBRA Letter
* Schedule exit interview
* Clarify PTO balances, and clarify how they will be administered
* Prepare documentation for the unemployment claim

**Accounting/Finance/ Payroll**

* Prepare the list of bank account access that an employee has, and identify the steps that will be needed to undertake to remove their access to the bank account
* Collect final expense reports
* Inform about any outstanding advances
* Final Expense Reports processed
* Credit Card reconciliation – completed
* Prepare final paycheck
* Determine if the employee holds the petty cash

**IT**

* Create a list of all organization’s property that this employee has, determine which of them need to be locked before the notification meeting
* Review the list of IT systems that staff member has

**Compliance**

* Review if an employee was referenced as key personnel in any of the grants
* If there are grants where the staff member is referenced as key personnel, prepare communication that will be sent to the funders and other key vendors and or customers about the transition

**Leadership**

* Consider whether any Board resolutions are necessary to grant authority to other personnel
* Determine if the creditors need to be notified for officer’s certificates
* Contact bank and others, as applicable, to inform of a change in signatory authority
* Prepare communications plan to the immediate staff members
* Prepare communications for overall staff and stakeholders

**Last Day of Employment**

* Prepare and deliver exit letter (including benefits)
* Non-Disclosure/ Confidentiality Agreement (if applicable)
* Provide copy
* Explain non-complete
* Retrieve any confidential information
* Last Paycheck (*Please check one*)
* Provided at the exit interview
* Mailed after the termination date
* Departure is communicated to staff
* The desk area is cleaned out
* **Remove Employee Access**
  + Terminate status in the HRIS system
  + Set automatic email response, remove employee’s name from email distribution lists
  + Collect keys to the office, laptop, and other equipment owned by the organization
  + Disconnect computer login
  + Remove the individual from any other staff list (internal, website, building directory, etc.)
  + Employee’s voicemail removed
  + Contact the bank and disconnect the access to the bank account (if applicable)
  + Contact credit and debit card companies and terminate employee’s accounts
  + Terminate access to finance systems
  + Terminate access to any other technology systems that employee has had access to
* **Final Pay**
  + The final paycheck is calculated based on the PTO balances, severance, outstanding advances, final expense reports, etc
  + Issue final paycheck