



## Exiting Employee Checklist

**Name:** \_\_\_\_\_ **Exit Date:** \_\_\_\_\_  
**Reason:** \_\_\_\_\_ **Position:** \_\_\_\_\_ **FTE:** \_\_\_\_\_

### **Employee completes:**

- Send letter of resignation or retiring to Supervisor
- Send all leave used to Liaison
- Send travel, mileages and expense reimbursements to Business department
- Caseload, files & outstanding referral organized for next employee
- Pay off all debts; copier, pop etc.
- Laptop computer returned
- Return keys to Liaison
- Phone messages erased
- New voice message recorded
- Turn in ID Badge to Liaison
- All Client files turned in to Liaison

### **Liaison completes the following:**

- Check to see that employee followed through with list above.

### **Send to HR**

- Fax letter of resignation to HR
- Review hours on calendar vs. actual and discuss any discrepancies, send final copy to HR.
- Calculate all leave hours used send to HR
- Send ID badge to HR for file
- Send all leave accounting documentation to HR for file
- Turn completed Exit form into HR for file

### **Send to Business Dept**

- Travel, mileage and expense reimbursements

### **Send/Ask Technology Dept**

- Laptop computer returned to Technology
- Forward computer docs to appropriate person or purge server
- Emails forwarded to appropriate person
- If VOIP system, notify Systems Engineer of phone and message status

### **Building Use**

- Supervisor completed Employee Evaluation process
- Formalize existing time
- Determine priorities for remaining work schedule
- Service Activity Logs turned in
- On last day:
  - Collect keys
  - Collect ID Badge send to HR
  - Conduct exit interview with director or supervisor (optional)
  - If on VIOP system, notify Systems Engineer of phone and message status

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