



DIocese OF OWENSBORO

Employee Exit Checklist

On the Date of the Employee's Notice:

- ✓ If an employee tells you of their intentions to leave, ask them to write a resignation letter, which should be filed in the employees' personnel file. Their letter should contain the last day they intend to work.
- ✓ Next you should notify the Pastor or employer that the employee has made their intentions to leave employment.
- ✓ The network administrator should be notified of the date the employee will no longer be working for the Parish or Diocese, so computer access can be deleted on the appropriate day.
- ✓ Within a day or so of the employees' resignation notice, make sure to give Full Time employees the following paperwork (if applicable): the Retirement change form, the 403 (B) change form, the UNUM Life insurance application and the Health Insurance Self-Pay Notification and Election papers. Also give them a copy of the exit interview form to complete before their last day. This will allow the employee time to review all their benefit options prior to their last day.
- ✓ Direct them to the Diocese's Human Resource Department at 270-683-1545 with any specific questions about their retirement or benefits.

On the Employee's Last Day:

- ✓ Obtain all Parish and Diocese property
- ✓ Obtain necessary passwords to access computer files
- ✓ Obtain the employees retirement and 403 (B) change form, if applicable
- ✓ Review with them to mail their Self Pay Election letter to BAS, Inc.
- ✓ Review status of vacation balance
- ✓ Review the last payroll check date with the employee and the days which will be included on their last check
- ✓ Review with the employee that they must contact the Parish or Diocese, if their address changes in the future, so current year tax forms etc. can be mailed to correct address.
- ✓ For Full Time Employees - Parish or school must send in Benefit Change Form to BAS, and Retirement Papers to Christian Brothers
- ✓ For Full Time Employees – Parish or school should give employees the UNUM Life Insurance conversion application. Employees can call UNUM at 1-800-421-0344 with any question but they must apply within 31 days.