



DIOCESE OF OWENSBORO

Employee Exit Checklist

For Diocesan locations - On the Date of the Employee's Notice:

- The Business Manager/Bookkeeper or the HR representative at a location must complete the following steps.
- If an employee tells you of their intentions to leave, ask them to write a resignation letter and file it in the employee's 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.
- Business Managers and Bookkeepers notify the IT department of the date the employee will no longer be working for the Parish or employer, so computer access can be removed on the appropriate day.
- Print the Diocese of Owensboro exit packet to start the process of completing the employee's termination paperwork. Make sure to complete all applicable forms and give a copy to the employee for their records. Within a day or so of the employee's resignation notice, make sure you complete and give full-time employees the following paperwork from the exit packet. This will give the employee time to review all their benefit options before their last day.
 - Key in termination on Employee Navigator and or the Christian Brothers website.
 - Provide the employee with the MUTUAL OF OMAHA Life insurance Portable and Convertible applications, along with a letter explaining the process for continuing their life insurance after leaving employment. Remind the employee that they have 60 days from their termination date to apply to continue coverage.
 - Christian Brothers Retirement forms. (You only need to complete the 403b form if the employee is enrolled or previously enrolled in the 403b plan.)
 - Health Insurance, dental, and vision self-pay is handled by ERS, a division of Houchens. The rates are included in the exit packet for review.
 - Anthem Critical Care Enrollment Form (if the employee is enrolled in the Anthem Critical Care insurance)
 - The Colonial YES form (if the employee is enrolled in the Colonial insurance)
 - Have the employee completed the exit interview form. The Business Manager or Pastor reviews it with them. The employee may send it to the Diocese HR Department.
- Employees enrolled in Anthem medical, Colonial benefits, HRI dental and vision benefits, and Anthem Critical Care Benefit and Life Insurance are eligible to continue

this coverage even after leaving employment, but must make an election within 31 days of the termination date.

- Key in the termination date into the Employee Navigator online portal and the Christian Brothers online portal within a day of receiving the resignation notice.
- Keep copies of all termination forms in the personnel file. Please indicate the date the employee is given the MUTUAL OF OMAHA Life Insurance papers.
- Direct employees to contact Diocese HR at 270-683-1545 with benefit or retirement questions.

On the last day, collect all Parish and Diocese property from the employee.

- Obtain the necessary passwords to access computer files.
- Review the status of the benefit available balance – see the employee handbook for policies on paid benefit time.
- Review the last payroll check date with the employee and the days covered by their last check.
- Review with the employee that they must contact the Parish or Diocese if their address changes in the future so that tax forms are mailed to the correct home address.
- For Full Time Employees – Make Sure to complete the online portal termination information or send termination paperwork to Christian Brothers
- For Full Time Employees – Make Sure - Employees are given the MUTUAL OF OMAHA Life Insurance conversion application. Employees can call MUTUAL OF OMAHA @ 1-800-877-5176 with any questions, but they must apply within 60 days of the last day worked.