



DIOCESE OF OWENSBORO Employee Exit Checklist

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

- ✓ **Business Manager/ Bookkeeper or person responsible for HR 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 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.
- ✓ Business Managers and Bookkeepers notify the IT department 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 forms that are applicable 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 which is in the exit packet. This will allow the employee time to review all their benefit options prior to their last day.
 - **Key in termination on Employee Navigator website.**
 - **MUTUAL OF OMAHA Life insurance Portable and Convertible applications with the letter explaining how an employee may keep their life insurance after leaving employment. The employee has 60 days from the date of termination to make this election.**
 - **Christian Brothers Retirement forms. (You only need to complete the 403b form if the employee is or enrolled or previously enrolled in the 403b plan.)**
 - **Health Insurance Self-Pay Notification/Election papers (If the employee enrolled in the health insurance.)**
 - **Anthem Critical Care Enrollment Form (if the employee enrolled in the Anthem Critical Care insurance.)**
 - **The Colonial YES form, and the BAS paper for continued Paramount Vision and Dental coverage.**
 - **The employee completes the exit interview form before their last day. The Business Manager or Pastor reviews the completed form with the employee. This form can be sent by the employee directly to the Diocese HR Department.**
- ✓ Employees enrolled in Colonial benefits, Paramount benefits, and Anthem Critical Care Benefit and Life Insurance are eligible to continue this coverage even after leaving employment but have 60 days to make an election from termination date.
- ✓ Key in termination date into Employee Navigator online portal and Christian Brothers online portal within a day of receiving the resignation notice. If you do not utilize these

online portals, please send completed paperwork to BAS and Christian Brothers within a day of receiving the resignation notice.

- ✓ **Keep copies in the personnel file of all termination forms, please indicate the date the self-pay forms and the employee the MUTUAL OF OMAHA Life Insurance papers given to the employee.**
- ✓ Direct the employee 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.
- ✓ Review status of benefit available balance – see employee handbook for policies on paid benefit time.
- ✓ Review the last payroll check date with the employee and the days which paid on their last check.
- ✓ Review with the employee that they must contact the Parish or Diocese, if their address changes in the future, for tax forms mailed to the correct home address.
- ✓ For Full Time Employees – Make Sure to complete online portal termination information or send in Benefit Change Form to BAS, and Retirement Papers to Christian Brothers
- ✓ For Full Time Employees – Make Sure - Employees given the MUTUAL OF OMAHA Life Insurance conversion application and Self-Pay papers. Employees can call MUTUAL OF OMAHA @ 1-800-877-5176 with any question, but they must apply within 60 days of the last day worked. Employees can call BAS @ 1-800-446-8469 with questions on Self-Pay but must elect coverage within 60 days of the last day worked.