

## TERMINATION CHECKLIST

Employee Name \_\_\_\_\_

Supervisor \_\_\_\_\_ Agency \_\_\_\_\_

### Archdiocesan property to be returned

- Cell Phone/PDA
- WiFi card
- ID Card / Key Card / PIN codes for doors
- Keys- office, building
- Keys- desk
- P-Card (generate final billing statement immediately to verify charges made in the latest billing cycle)
- Laptop and peripherals (mouse, power cord)
- Other \_\_\_\_\_

### Computer and technology

- Transition of files, external drives, thumb drives, or any other AOC property on site or at home, including data files
  - Secure passwords for protected files
- Review and change all passwords
  - Access to network (Contact IT)
  - Remote access (Contact IT)
  - Online banking, P-Card (Contact Finance)
  - Determine access to external systems (banking, vendors, etc) and arrange for termination.
  - Obtain current passwords establish new passwords for any other systems, such as webinar (e.g., Citrix), Survey Monkey, administrator access to website, etc.
- Transfer/cancel employee's e-mail account (Contact IT)
- Set automatic e-mail notification to alert sender that employee is no longer employed, forward emails to manager (Contact IT)
- Update group email distribution lists

### Expense Reports

- Obtain Employee's final expense report

Governance:

- Identify all committees and councils on which the employee served in their employment, and notify appropriate individuals
- Consider whether any Board resolutions are necessary to grant authority to other personnel

If the employee has significant contacts/relationships with Parishes and Schools, create an appropriate correspondence to communicate as necessary regarding the new contact for service.

Other Operational matters:

- Remove employee's name from Archdiocesan websites
- Remove person as contact on printed documentation
- Be prepared to reviewing incoming e-mail
- Be prepared to respond to phone calls
- Contact bank and others, as applicable, to notify of change in signatory authority
- Change passwords for online banking and other remote access financial services

Security Considerations **(IF APPLICABLE)**:

- Consider whether employee could potentially be volatile and whether security should be called in advance
- Change locks on doors
- Change entry code on keypad locks
- Consider relocating petty cash
  
- Place completed checklist in Employee's file

\_\_\_\_\_  
Agency / Department Director Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date