

Personnel Exit Form

Name:

Forwarding address:

Phone number:

Position:

Date of Hire:

Date of Departure:

Reason for Departure:

Personnel Exit Form

TECHNOLOGY CHECKLIST:

Disconnect desktop/laptop

Disconnect email on personal devices

Reply message changed to "Mr. Smith is no longer with the Firm. Please direct Firm matters to Ms. Jones (email address)

Disconnect other internal systems

Change phone message to "Mr. Smith is no longer with the Firm. Please direct Firm matters to Ms. Jones (phone extension)

WORKFLOW CHECKLIST:

Transfer of open client matters

Transfer of client files

Transfer of firm files/documents

ADMINISTRATIVE CHECKLIST:

Final Paycheck (deadline is state specific)

Attorneys (with vacation/sick payout) or

Staff (with PTO pay-out, overtime)

BENEFITS CHECKLIST:

Notify health insurance

Notify COBRA administrator

Notify other carriers (dental, short-term, long-term, life, disability and accidental death)

Notify 401(k) carrier

ITEMS TO INCLUDE IN EMPLOYEE TERMINATION PACKAGE:

COBRA administrator information

List of all insurance carrier contact information

Forms for any portable benefits

Severance agreement (if applicable)

State Unemployment form (as a courtesy only)

