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|       |  |       |  |       |
| *Employee Name (printed)* |  | *Title* |  | *Effective Date**(Last day of pay +1)* |
| *This document is available for HR use only, and should not be provided to the supervisor or departing employee. The steps included below are required (as applicable) for every employee leaving the Executive Branch/18A. Retention is determined at the discretion of the agency; however, this checklist should not be maintained in the Agency Personnel Folder.* |
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| **Select the employee’s method of departure below:** |
| [ ]  | **Resignation or** [ ]  **Retirement** |
|  | [ ]  Employee provided written signed notice reflecting the appropriate effective date and departure type. |
|  | [ ]  Employee provided 14 (fourteen) calendar days of notice.  |
|  | [ ]  Employee provided less than 14 (fourteen) calendar days of notice. |
| [ ]  | **Termination** |
|  | [ ]  Agency provided required notice to employee? |
|  |  [ ]  From initial probation? |
|  ⮡ If probationary, was the employee notified prior to completion of probation? | [ ]  Yes / [ ]  No |
|  |  [ ]  From unclassified employment (i.e. non-merit, FFTL, interim)? |
|  ⮡ If unclassified, has the employee obtained 16 (sixteen) years of career service? | [ ]  Yes / [ ]  No |
|  ⮡ If the unclassified employee has obtained 16 (sixteen) years of career service, the termination letter includes notification of the employee’s reemployment rights? | [ ]  Yes / [ ]  No |
| [ ]  | **Dismissal** |
|  | [ ]  Agency provided appropriate letter, signed by the Appointing Authority (or designee), to employee? |
| [ ]  | **Death** [See [Procedure for Paying Deceased Employees](https://hr.personnel.ky.gov/Documents%20Restricted/ProcPayingDeceasedEEs.pdf)] |

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| **Documents to Provide to Departing Employee:** |
| [ ]  [Exit Interview Questionnaire](https://hr.personnel.ky.gov/Documents%20Anonymous/ExitInterviewQuestionnaire.doc) (must be provided by Human Resources office) |
| [ ]  [Payout Request for Remaining Leave Balance Value](https://extranet.personnel.ky.gov/_layouts/15/DL/DL.aspx?Library=DHRA&FileName=LeaveBalance-PayoutRequest.doc) (if applicable)  |
| [ ]  KECC [Separation Pledge Form](https://extranet.personnel.ky.gov/DHRA/KECC-SeparationPledgeForm.pdf) |
| [ ]  “[Leaving State Government](https://ethics.ky.gov/resources/Pages/LeavingStateGovernment.aspx)” Brochure and Information |
| [ ]  [Personal Information Update Form](https://extranet.personnel.ky.gov/DHRA/PersInfoUpdateForm.pdf)  |
| [ ]  [Sick Leave Sharing Enterprise Program – Information for Separating/Retiring Employees and Donor Disclaimer](https://extranet.personnel.ky.gov/DHRA/SLS-InfoSepRetEEandDonorDisclaimer.pdf) |
| [ ]  [KRS Form 6000 Notification of Retirement](https://kyret.ky.gov/Publications/Forms/Pages/Member-Forms.aspx) (if applicable, employee should work directly with KRS as needed) |

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| **Processes to Complete** |
| [ ]  Review the employee’s information in KHRIS: |
|  [ ]  Ensure timesheet in KHRIS agrees with the effective date provided above. |
|  [ ]  Determine if the employee is serving promotional probation or on detail to special duty. If yes, the employee must be reverted back to the position which merit status was obtained prior to separating. |
|  [ ]  Verify the employee’s increment/probationary date (if applicable). * Ensure tasks effective prior to separation date are processed prior to separation action.
* Ensure tasks effective soon after separation prompt a review of the monthly annual increment/probationary increase mass upload spreadsheets. Employee must be marked off of the listing (if applicable).
 |
| [ ]  Process personnel action(s) through the Self-Service Portal, HRG tab. |
| [ ]  Process KECC separation pledge (if applicable). |
| [ ]  Process Sick Leave Sharing Donation(s) (if applicable). |
| [ ]  Process payout of eligible leave balances. [See [Leave Balance Value–Payout Information and Processing Instructions](https://hr.personnel.ky.gov/Documents/LeaveBalanceValue-PayoutInfoProcessInstructions.pdf)] |
| [ ]  Mail copy of employee’s Personnel Action Notification (PAN). |
| [ ]  Inactivate agency Personnel, Payroll, Medical Files. |
| [ ]  Review the employee’s benefit information and ensure process are completed: |
| [ ]  Enter Health Insurance, Medical and Dependent Care FSA, or Waiver HRA terminations in KHRIS within 10 business days of the employees’ termination. |
| * COBRA will automatically be offered by WageWorks based on termination date in KHRIS
* If employee terminates employment between the 1st and 15th of the month, Health Insurance, FSA, and Waiver HRA benefits will terminate the 15th of the same month
* If employee terminates employment between the 16th  and the end of the month, Health Insurance, FSA, and Waiver HRA benefits will terminate the end of the same month
* In the event the termination is not processed timely, the benefit termination date must not be backdated more than 90 (ninety) days.

Refer to the Kentucky Employees’ Health Plan (KEHP) [Administration Manual](https://extranet.personnel.ky.gov/KEHP/Admin%20Manual.pdf) for more details related to health benefit policies and procedures.   |
| [ ]  Life Insurance Conversion letter |
| [ ]  Review the employee’s Performance Evaluation (for eligible employees): |
| *[ ]* Print and provide copies of evaluations to employee upon request. |
| [ ]  Check reports-to relationships for accuracy. |
| *For separations effective January 1-30:*  |
| [ ]  Supervisor completed the Final Performance Evaluation prior to the employee’s departure.  |
| *For separations effective prior to January 1:*[ ]  Supervisor **DID** **NOT** complete the Final Performance Evaluation[ ]   |
| *(Note: An employee working* ***on*** *December 31 is eligible for a Final Performance Evaluation – the effective date is January 1.)* |

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| **Remaining Items to Consider** |
| * Does the employee have remaining Adverse Weather Leave? If yes, see [Clear Adverse Weather Leave](https://hr.personnel.ky.gov/Documents%20Restricted/AWLClear.pdf) Quick Reference Guide?
* Does the employee have any remaining agency reimbursements?
* Did the employee have a home workstation? If yes, update position address to agency address.
* Has the employee participated in the Educational Assistance Program? If yes, have all obligations been met?
* Was the employee delegated signature authorization? If yes, has a revoke form been submitted?
* Was the employee assigned security access to any of the following HR Systems? If yes, has the ASC been notified?

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| * KHRIS
 | * MyPURPOSE
 | * Legacy (CICS)
 | * Document Direct
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* Does the employee have any of the following items pending that may require notifying assigned staff of separation?

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| * Discipline
 | * Grievance(s)
 | * + Personnel Board appeal(s)
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