



OE Separation Checklist

Managers: Please review & complete this list prior to your team member's last day of employment.

- ❑ **Separation or Retrenchment?:** Unless the decision to end a team member's employment is due to misconduct, poor attendance/attitude or overall low performance, consider if there are any alternatives to termination. Talk to HR prior to meeting with the employee to determine if there might be an opportunity to retrench the employee elsewhere in the organization, thus maintaining their employment & benefits. Consider whether you'd recommend them or not. Also, if the individual's position is being eliminated due to a corporate action/reorganization, discuss with HR in advance whether any severance pay is appropriate.
- ❑ **Documentation:** Complete a final Status Change form and attach either a Separation Report (available in HR) or the team member's resignation letter. Review your documentation with a member of HR to ensure accuracy or if you have concerns about proper language.
- ❑ **Reason for leaving:** Schedule a meeting with the team member & discuss this with the team member using your comments on the separation report if applicable. It is not *mandatory* that you provide the team member with a copy of the separation report.
- ❑ **Exit Interview:** *Unless you are communicating & terminating on the same day*, ask the team member to contact Dave Kay in HR for an exit interview. You can even set this up in advance for them with Kay.
- ❑ **Company property:** Retrieve phone, pager, keys, or other OE items.
- ❑ **Electronic door key:** Retrieve this and give it to the OE receptionist.
- ❑ **Benefits:** Continue through the end of the month in which their employment ends. COBRA is available at the team member's cost to continue health insurance. Details and forms will be mailed to the team member's home within two weeks.
- ❑ **401k:** Ask the team member if they are enrolled in the 401k plan. Their funds will stay in the OE plan until they notify HR with instructions to roll-over to a new employer, cash out, etc. Ask them to contact Dave Kay in HR.
- ❑ **Employee Stock Purchase Plan:** Ask the team member if they are enrolled in the ESPP. If so, inform them that they may either leave their funds deducted to date in that quarter & have shares purchased per normal procedure at the end of the quarter, OR they may submit a standard ESPP withdrawal form before the end of the quarter to have their deductions returned to them. The ESPP withdrawal form is available in HR.



- ❑ **Unemployment:** Unless they are being fired for misconduct, the team member should be encouraged to go & file for unemployment benefits at their earliest convenience as there is a 1-week waiting period mandated by Employment Security. OE may choose to, and in many cases does, contest unemployment benefits for former team members. OE does not determine eligibility, however, and in the case of a lack of work/reduction in force, the employee affected will likely be eligible for unemployment benefits.

- ❑ **Vacation Pay:** All accrued vacation (the amount on their paycheck) is paid on the final check.

- ❑ **Sick pay:** Is not paid out at termination.

- ❑ **Final paycheck:** Is paid on the next regular payday. This is mailed to the team member's home unless other arrangements are made with Payroll.

After the team member is separated:

- ❑ Send their name and term date to Term Notification on email (no details please)
- ❑ Change passwords the team member knew
- ❑ Finish the separation report and complete a status change form
- ❑ Obtain your department's VP's signature on the status change and forward it to H.R.
- ❑ Complete a Request for Hire for a replacement, if applicable