

PEO EXIT CHECKLIST

Before leaving your current PEO, be sure to collect the following items so you are ready to transition.

✓	DEFINE NEEDS	MM/DD/YYYY
<input type="checkbox"/>	Transition <input type="checkbox"/> Alternative PEO Service <input type="checkbox"/> HR Provider <input type="checkbox"/> Payroll Provider <input type="checkbox"/> In-House HR	
<input type="checkbox"/>	Timeframe <input type="checkbox"/> End of Quarter <input type="checkbox"/> End of Year	
✓	GATHER INFORMATION	
<input type="checkbox"/>	Payroll Documents	
<input type="checkbox"/>	Tax Information	
<input type="checkbox"/>	Deduction Information	
<input type="checkbox"/>	PTO Balances	
<input type="checkbox"/>	Benefits Data	
<input type="checkbox"/>	Performance Evaluations	
<input type="checkbox"/>	Termination Records	
✓	COMMUNICATE OPTIONS TO EMPLOYEES	
<input type="checkbox"/>	Health Insurance	
<input type="checkbox"/>	FSA and HRA	
<input type="checkbox"/>	401k	
<input type="checkbox"/>	Other Benefits	
✓	HR AND PAYROLL COMPLIANCE OBLIGATIONS	
<input type="checkbox"/>	Federal and State Tax ID Numbers	

<input type="checkbox"/>	Workers' Compensation	
<input type="checkbox"/>	COBRA Obligations	
<input type="checkbox"/>	Garnishment Orders	
<input checked="" type="checkbox"/>	NEW EMPLOYEE PAPERWORK	
<input type="checkbox"/>	Onboarding Packet	
<input type="checkbox"/>	Direct Deposit Form	
<input type="checkbox"/>	Form W-4	
<input type="checkbox"/>	Form I-9	
<input type="checkbox"/>	Employee Handbook	
<input type="checkbox"/>	Leave Policies	
<input type="checkbox"/>	Non-Discrimination and Harassment Policies	