

PEO EXIT CHECKLIST

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

✓	DEFINE TRANSITION NEEDS
	<input type="checkbox"/> Alternative PEO Service <input type="checkbox"/> HR Provider <input type="checkbox"/> Payroll Provider <input type="checkbox"/> In-House HR
✓	DETERMINE TIMEFRAME
	<input type="checkbox"/> End of Quarter Sep 30, 2023 <input type="checkbox"/> End of Year Dec 31, 2023
✓	GATHER COMPANY AND EMPLOYEE INFORMATION
	<input type="checkbox"/> Payroll Documents <input type="checkbox"/> Company Tax Information <input type="checkbox"/> Employee 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"/> 401k <input type="checkbox"/> Other Benefits
✓	REQUEST UPDATED INFORMATION
	<input type="checkbox"/> FSA <input type="checkbox"/> HRA
✓	HR AND PAYROLL COMPLIANCE OBLIGATIONS
	<input type="checkbox"/> Federal and State Tax ID Numbers

	<ul style="list-style-type: none"><input type="checkbox"/> Workers' Compensation<input type="checkbox"/> COBRA Obligations<input type="checkbox"/> Garnishment Orders<input type="checkbox"/> Payroll
✓	NEW EMPLOYEE PAPERWORK
	<ul style="list-style-type: none"><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