PEO EXIT CHECKLIST

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

| ✔ | **DEFINE TRANSITION NEEDS** |
| --- | --- |
|  | * Alternative PEO Service * HR Provider * Payroll Provider * In-House HR |
| ✔ | **DETERMINE TIMEFRAME** |
|  | * End of Quarter Sep 30, 2023 * End of Year Dec 31, 2023 |
| ✔ | **GATHER COMPANY AND EMPLOYEE INFORMATION** |
|  | * Payroll Documents * Company Tax Information * Employee Deduction Information * PTO Balances * Benefits Data * Performance Evaluations * Termination Records |
|
|
|
| ✔ | **COMMUNICATE OPTIONS TO EMPLOYEES** |
|  | * Health Insurance * 401k * Other Benefits |
|
|
| ✔ | **REQUEST UPDATED INFORMATION** |
|  | * FSA * HRA |
| ✔ | **HR AND PAYROLL COMPLIANCE OBLIGATIONS** |
|  | * Federal and State Tax ID Numbers * Workers’ Compensation * COBRA Obligations * Garnishment Orders * Payroll |
|
|
| ✔ | **NEW EMPLOYEE PAPERWORK** |
|  | * Onboarding Packet * Direct Deposit Form * Form W-4 * Form I-9 * Employee Handbook * Leave Policies * Non-Discrimination and Harassment Policies |