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
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| ✔  | **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
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| ✔  | **COMMUNICATE OPTIONS TO EMPLOYEES** |
|  | * Health Insurance
* 401k
* Other Benefits
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| ✔  | **REQUEST UPDATED INFORMATION** |
|  | * FSA
* HRA
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| ✔  | **HR AND PAYROLL COMPLIANCE OBLIGATIONS** |
|  | * Federal and State Tax ID Numbers
* Workers’ Compensation
* COBRA Obligations
* Garnishment Orders
* Payroll
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| ✔  | **NEW EMPLOYEE PAPERWORK** |
|  | * Onboarding Packet
* Direct Deposit Form
* Form W-4
* Form I-9
* Employee Handbook
* Leave Policies
* Non-Discrimination and Harassment Policies
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