

## Onboarding - HR toolkit

### 1. Determining reasons for ending employment

- Reasons for ending employment include:
  - Resignation or retirement – employees must submit an Employee Resignation & Retirement Confirmation Letter.
  - Funding no longer available or role no longer needed – see termination not for cause.
  - Termination with or without cause
- Understanding the administrative and operational requirements when ending employment is critical.
  - The Ending Employment Checklist and Internal Ending Employment Checklist can help guide this process.
  - Learn more about how to provide a Record of Employment (ROE).
- Ensuring a successful knowledge transfer.
  - In advance of their departure, request that the employee prepare a transition document that outlines key information that will support the next person in the role.
  - Reviewing the document with your employee before their departure allows the opportunity to ask questions and seek further clarification.
- Conducting exit interviews:
  - The main objectives of an exit interview include:
    - Uncovering issues relating to Human Resources.
    - Understanding the employee's perception of the work.
    - Gaining insight into managers' leadership styles and effectiveness.
    - Fostering innovation by asking about areas for improvement.
- When conducting an exit interview, ask if the employee would prefer to participate in person, over the phone, or by email. The interviewer should be someone who is neutral in the employee/employer relationship to create a safe environment for honest feedback. Using the Exit Interview Guide can help keep questions consistent and objective.
- Alternatively, create a survey to use for exit interviews using an online platform such as Survey Monkey.
- Reviewing the responses, identifying key themes in the larger context, and following up on any significant matters that may require investigation will help strengthen the work environment and culture.

## 2. Understanding types of termination

- With cause (or “for” cause) - Employee not entitled to a notice period.
  - After other disciplinary measures have been unsuccessful in correcting unacceptable conduct/performance, or when a first time incident occurs that is illegal or very serious in nature. (For example: theft, failure to comply with safety/office policies, intentional harassment, etc.)
  - In cases of terminations with cause, the burden of proof for just cause rests with the employer.
  - Always consult a legal or HR professional for terminations with cause.
- Without cause - Employee is entitled to a notice period.
  - Termination without cause means ending an employee’s employment not for workplace misconduct. Possible reasons for termination without cause include restructuring, cost-cutting, realignment or poor work performance.
  - A notice period is a length of time from the date on which notice of termination is given to an employee to the date on which employment will terminate.
  - Minimum notice requirements are informed by the Employment Standards Act and any applicable contractual notice or severance entitlements that are articulated in company policy or the employee’s employment agreement.

## 3. Initiating the termination process

- Preparing the proper documentation prior to terminating an employee can be done by using the Ending Employment checklist.
- To reduce chances of physical or verbal violence, conducting the termination in the employee’s office or a neutral, confidential location can help. Have at least one other person present.
- Important steps to consider following the termination are:
  - Making notes for future reference.
  - Meeting with remaining team members to answer any non-confidential questions
  - Confirming all final paperwork is prepared and submitted.
- Reviewing the Termination Process information sheet can help guide you through the termination process in greater detail.

#### 4. Understanding notification requirements and severance entitlements

- An employer does not need to issue a notice of termination or severance in the following circumstances:
  - When the employee:
    - voluntarily resigned.
    - is in their probationary period.
    - is retiring.
    - was dismissed for just cause.
    - was employed on contract and the term has expired.
    - worked on a casual basis doing temporary assignments which they could accept or reject.
- An employer must issue a notice of termination or severance in all other cases
- Determining notice requirements
  - Seek advice in advance from a lawyer or HR professional to assess any situations based on whether termination is with or without cause.
- Ensure alignment with the Employment Standards Act and terms of any employment contract.
  - Provide written notice and/or compensation based on length of service for terminations without cause.
- Providing working notice
  - Is an option when the position has a defined end date and all parties are clear on the parameters and expectations of the role.
  - Not appropriate in situations where employment is ending for unexpected reasons where employees working through their notice could have a negative impact.
- Issuing severance and release
  - Follow the Employment Standards Act and consider consulting a lawyer or HR professional.
  - When there is pay in addition to the minimum required by the Employment Standards Act, the employee is required to sign a release outlining the terms of severance only. A Severance form can help with the process.

[ORGANIZATION LOGO]

## Employee resignation/retirement confirmation letter

Enter employee address.

Enter the date.

Dear Enter employee's name.,

This letter is to confirm our receipt of your letter of [resignation/retirement]. As mutually agreed to by you and your supervisor, your last day at work with Organization will be Date.

We wish to express our appreciation for all your contributions to Organization. If you have any questions or concerns about transitioning out of the workplace, please do not hesitate to speak with your supervisor or contact our HR Department. On the back of this letter, we have included some important reminders to aid you in planning your departure from Organization.

Importantly, as per the Confidentiality Agreement you signed upon your appointment at Organization, We would like to remind you that you are legally obligated to maintain confidentiality about our work and service users after your employment with us ends.

We wish you all the very best in your future endeavours and thank you again for your dedication and hard work in fulfilling the vision and mission of Organization.

Sincerely,

Enter organization, name(s), signature, and title.

Cc. Enter name of employee supervisor, title

Cc. Employee File

**NOTE:** Please include this form in the employee's personnel file along with any supporting documentation.

[ORGANIZATION LOGO]

## **IMPORTANT REMINDERS**

### **VACATION AND OVERTIME PAY-OUT**

Any outstanding vacation balance and/or banked overtime hours will be paid out on your last paycheque. Make sure you and your supervisor are in agreement of what is owed.

### **OUTSTANDING RECEIPTS**

Make sure that any work receipts are submitted to Payroll in advance of your departure. No receipts submitted after your last day of work will be reimbursed.

### **MEDICAL/DENTAL BENEFITS**

All benefits, including medical and dental benefits, will cease on your last day of employment. Make sure to arrange alternate medical and dental coverage in advance of your departure.

### **PENSION**

All pension contributions will cease on your last day of employment. Connect with the pension provider for questions regarding your pension.

### **EMAIL**

If you have a company email, be aware that your email account will be closed three (3) days after your last day of employment. Make arrangements for all personal and/or important email contacts to be transferred to an alternate email account.

### **EQUIPMENT, TOOLS, AND ACCESS**

Any and all equipment, tools, and accesses (e.g., keys/fobs) that have been provided to you as part of your employment must be returned on your last day of employment. Failure to do so may result in your last paycheque being withheld until all items are returned.

### **STIPENDS**

Any and all stipends (e.g., cellphone, car) that have been provided to you as part of your employment will cease on your last day of employment.

### **RECORD OF EMPLOYMENT (ROE)**

An ROE will be issued after your last day of employment. This ROE will be submitted electronically to Service Canada and you will have access to it via your "My Service Canada" account. If you wish to receive a copy via an alternate method you must submit a request directly to the HR Department.

### **T4 SLIP**

A T4 slip for the current year worked will be issued to you in February of the following year and will be mailed to the address on file. If you move after your departure and before February of the following year, you are responsible for contacting the HR Department to update your address on file.

**NOTE:** Please include this form in the employee's personnel file along with any supporting documentation.

## Ending employment checklist

To ensure a smooth transition as you end your employment with ORGANIZATION, it is important to review and clarify the items on this checklist with your supervisor before your last day. Please initial all statements to acknowledge that you understand and will adhere to guidelines.

### END DATE OF EMPLOYMENT

Taking into consideration the needs of the employee and the organization, the following end date of employment has been agreed upon:

ENTER DATE

\*NOTE: If the employee has outstanding vacation days, it is advised that they are paid out for the outstanding balance. This is in lieu of taking their remaining vacation days before ending their employment.

### VACATION PAY-OUT (if applicable)

Any outstanding vacation balance will be paid out on your last paycheque.

Number of vacation hours outstanding as of the last date of employment:

### OVERTIME PAY-OUT (if applicable)

Any banked overtime hours will be paid out on your last paycheque. ENTER HOURS

Number of banked overtime hours as of the last date of employment: ENTER NUMBER

### MEDICAL/DENTAL BENEFITS (if applicable)

\_\_\_\_\_ I understand that all medical and dental benefits will cease on my last day of employment with ORGANIZATION. I understand I am personally responsible for arranging alternate medical and dental coverage as I may require.

### PENSION (if applicable)

\_\_\_\_\_ I understand that all pension contributions will cease on my last day of employment and that I will personally need to contact the pension provider if I have questions regarding my ORGANIZATION pension plan.

### EMAIL

\_\_\_\_\_ I understand that my company email will be closed three (3) days after my last day of employment. I have made arrangements for all my personal and/or important contacts to be transferred to my personal email account.

### EQUIPMENT, TOOLS & ACCESS

I currently possess the following equipment and tools (laptop, cell phone, car, etc):

- Computer/Laptop     Cell phone     Fobs/Keys

NOTE: Please include this form with the employee's Severance Form and any supporting documentation to the HR Department for final approval and processing.

[ORGANIZATION LOGO]

Other: \_\_\_\_\_

\_\_\_\_\_ I understand that I will need to return all equipment on my last day of employment. I understand that failure to do so may result in my last paycheque being withheld until all items are returned.

**STIPENDS**

As part of my employment, I currently receive a stipend for my:

Cellphone     Other

\_\_\_\_\_ I understand that all monthly or annual stipends I receive as part of my employment will cease on my last day of employment.

**RECORD OF EMPLOYMENT (ROE)**

\_\_\_\_\_ I understand that an ROE will be issued after my last day of employment. This ROE will be submitted electronically to Service Canada and I will have access to it via "My Service Canada" account. If I wish to receive a copy via an alternate method, I understand I must submit a request directly to the HR Department.

**T4 SLIP**

\_\_\_\_\_ I understand that my T4 slip for the current tax year will be issued to me at the end of February next year and will be mailed to my address on file.

**MAILING ADDRESS**

\_\_\_\_\_ I understand that after leaving ORGANIZATION I am responsible for updating my home address on file with HR/Payroll if I wish to successfully receive future documents, such as my T4 slip.

**WORKLOAD**

\_\_\_\_\_ We have discussed my workload and outstanding projects and have made satisfactory arrangements to ensure adequate transfer of information to my replacement.

**ADDITIONAL ARRANGEMENTS & NOTES**

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Signature: \_\_\_\_\_ Date: ENTER DATE  
(Employee)

Signature: \_\_\_\_\_ Date: ENTER DATE  
(Supervisor)

**NOTE:** Please include this form with the employee's Severance Form and any supporting documentation to the HR Department for final approval and processing.

## INTERNAL ENDING EMPLOYMENT CHECKLIST

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_

### SUPERVISOR

#### COMMUNICATION

- Notify staff and management with an internal notification of termination (be mindful of potential sensitivity around timing and method).

### HUMAN RESOURCES DEPARTMENT

#### EXIT INTERVIEW

- Schedule an in-person exit interview and/or online survey for the employee to complete before their final week of work, if possible.

#### BENEFITS [HR/Finance]

- Reconcile taxable benefits and process any necessary adjustments on final pay.
- Reconcile employee-paid benefits deductions and process any adjustments on final pay.
- Cancel or continue benefits until last day of employment.
- Provide employee with information on options to convert any benefits to an individual plan.
- Notify pension department/administrator regarding Pension Plan/Group RRSP.
- Check paid time off (PTO) balance; inform employee of any remaining PTO and how it will be processed at termination of employment.

#### CONTRACTS/LEGAL

- Provide a letter reminding employee of any legal obligations that continue post-employment (such as confidentiality agreements or employment contracts).

#### RECORDS

- Pull personnel file to be stored with terminated employee files.
- Advise employee to provide any changes to current address for year-end purposes (T4, RL-1, etc.) by phone or email.
- Prepare Record of Employment (ROE) and submit electronically within legislated time frame.

### PAYROLL

#### COMPENSATION

- Notify Payroll department to process final paycheque.
- Inform Payroll of any unused but earned PTO amounts due to employee.
- Notify Payroll to process severance pay and whether lump sum or salary continuation (if applicable).

### ADMINISTRATION

#### INFORMATION TECHNOLOGY

NOTE: Please include this form with the employee's Severance Form and any supporting documentation to the HR Department for final approval and processing.



ORGANIZATION LOGO

- Disable email account.
- Disable internal communication accounts.
- Remove employee's name from email group distribution lists; internal/office phone list; website and building directories.
- Disable computer access.
- Disable phone extension.
- Disable voicemail.

FACILITIES/OFFICE MANAGER

- Disable security codes, if necessary.
- Change office mailbox.
- Clean work area and remove personal belongings.

ADDITIONAL ARRANGEMENTS & NOTES

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Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Supervisor)

NOTE: Please include this form with the employee's Severance Form and any supporting documentation to the HR Department for final approval and processing.

## EXIT INTERVIEW GUIDE

Name: \_\_\_\_\_ Employment Date: \_\_\_\_\_

Department: \_\_\_\_\_ Termination Date: \_\_\_\_\_

Position: \_\_\_\_\_ Supervisor: \_\_\_\_\_

### INTRODUCTION

Describe the purpose for the interview and approximately how long it will take. Explain how the interview process will work.

[Click here to enter text.](#)

### INTERVIEWER QUESTIONS

#### PART A: REASONS FOR LEAVING

Why are you leaving your position?

[Click here to enter text.](#)

If you could change anything about the organization, what would you change?

[Click here to enter text.](#)

Prior to making the decision to leave, did you voice your concerns to anyone else at the organization? Why or why not?

[Click here to enter text.](#)

#### PART B: EXPERIENCE

Did your position meet your expectations?

[Click here to enter text.](#)

**INSERT ORGANIZATION LOGO**

**Did you feel you had all the resources you needed to do your best work here?**

Click here to enter text.

**What did you appreciate most about working here?**

Click here to enter text.

**How would you describe the culture of the organization?**

Click here to enter text.

**How could the organization have made more use of your abilities and potential?**

Click here to enter text.

**Is there anything we could have done to make you want to stay?**

Click here to enter text.

**PART C: LOOKING AHEAD**

**What do you see as the biggest risks for our organization?**

Click here to enter text.

**What advice would you give to the board of directors/senior leadership of the organization?**

Click here to enter text.

**What would make this a better place to work?**

Click here to enter text.

**Would you consider working here again?**

Click here to enter text.

**NOTE:** Please include this form in the employee's personnel file along with any supporting documentation.

INSERT ORGANIZATION LOGO

Would you recommend others apply for a position here? Why or why not?

Click here to enter text.

Additional comments about your position or the organization?

Click here to enter text.

## CONCLUSION

Thank the person for their time and let them know how they can follow up with you if they have any further comments.

NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

## Termination Process

### 1. Preparing for termination

- Proper documentation is critical. Prepare the required document in advance to present at the meeting.
- To assist with this, use the [Internal Ending Employment Checklist](#) and [Ending Employment Checklist](#).
  - Prepare communications for immediate release to other employees. It is critical to exercise discretion with both internal and external email communications concerning the reason for the employee's departure. The reasons for an employee's termination are personal information which must not be shared.
- Consider preparing a script to guide the termination conversation, ensuring it is clear to the employee that the decision is firm and irrevocable. The content of your message and how you phrase it depends on the reason for termination.
- Determine whether you are prepared to provide a reference for the employee's potential future employers.
- You may choose to provide a letter of reference which only sets out the employee's position, duties, and dates of employment and restricts reference requests to the information contained in the letter.

### 2. Conducting the termination

- Be prepared with the following:
  - Two (2) copies of the termination letter confirming the decision and the details of additional severance pay and release (as applicable); one (1) copy in an envelope is for the employee being terminated.
  - Self-addressed and stamped envelope for return of signed release (as applicable).
  - Paycheque or direct deposit information for final pay.
  - Termination conversation script.
  - [Internal Ending Employment Checklist](#) and [Ending Employment Checklist](#).
- Conduct the termination in the employee's office or a neutral site.
- Have at least one other person present for the termination.
- Keep the termination meeting as short as possible and refrain from engaging in any detailed discussion about the reasons for the termination with the employee.

- Request that all company belongings be returned immediately or by a specified date if not readily available. Pre-arrange a time and place to meet as appropriate.
  - Consider having a list of items that are required to be returned for the employee to use as a reference.
- Provide the employee with a box and request the employee gather their belongings immediately or offer to do it for them and return to them via courier.
- Ensure they leave the building without the appearance that they are being forcibly escorted out.
- Ensure the employee has a way to get home safely.

Note: This termination process applies to a termination without working notice. If someone is given working notice, they would not be asked to leave immediately, pack up their items, etc.

Consider the following:

- Meet at the start/end of the day, when fewer employees are around.
- Meet at the beginning of the week as this provides the employee with the opportunity to seek counsel (lawyer, financial advisor, etc.).
- If you are providing a release, do not ask the employee to sign it immediately. Encourage them to take time to consider the release and seek independent legal advice prior to signing it.

### 3. After the termination

- Immediately make notes about the termination meeting for future reference in case any litigation ensues.
- Meet with remaining team members to answer any questions they may have about the future of the team. Share any new reporting structure information and provide reassurance while maintaining confidentiality of the terminated employee and the process.
- Send communications and/or set up meetings as appropriate to notify any other team members, the board, and/or key stakeholders.
- Confirm all final paperwork is prepared and submitted (e.g., Record of Employment (ROE)).
- If providing a reference, ensure that the person assigned to give the reference is aware of what they may share with potential employers.

# SEVERANCE FORM

EMPLOYEE INFORMATION			
EMPLOYEE ID	FIRST NAME	MIDDLE NAME	LAST NAME
POSITION	REGULAR/TERM/CASUAL	FULL/PART TIME	PART TIME (%)

LEAVING [ORGANIZATION]			
ACTION REASON (see back for options)	LAST DAY TO BE PAID (YYYY/MM/DD)	VACATION OWING (HOURS)	SEVERANCE PAY (HOURS) (if applicable)

IF VACATION AND/OR SEVERANCE TO BE PAID OUT OF DIFFERENT ACCOUNT THAN SALARY	
VACATION PAYOUT	BUDGET ACCOUNT
SEVERANCE PAYOUT	

SIGNATURES			
SIGNATURE (Supervisor)	NAME (print)	DATE	SIGNATURE (Other)
SIGNATURE (Executive Director)	NAME (print)	DATE	SIGNATURE (HR)
			NAME (print)
			DATE

NOTE: Please include this form in the employee's personnel file along with any supporting documentation.

## INSTRUCTIONS FOR FILLING OUT THE SEVERANCE FORM:

### A. ACTION REASONS FOR LEAVING

When filling out the [Severance Form](#), please select one of the following [Action Reasons](#):

ACTION
Resignation
Retirement
Term Appointment Ended
Termination Without Pay
Termination With Pay
Death
Dismissal

### B. SEVERANCE FORM PROCEDURES

1. The employee's out-going supervisor must complete and sign the [Severance Form](#).
2. The [Severance Form](#) must be sent to the HR Department with any required supporting documentation such as:
  - The employee's letter of resignation or retirement
  - The employee's signed letter of dismissal

NOTE: Please include this form in the employee's personnel file along with any supporting documentation.