THE ART AGENCY

THE ART AGENCY · CORRECTIVE ACTION & SEPARATION

Employee Separation Checklist

Operations Handbook §14 · Complete within 2 hours of separation

Employee Name: _____

Separation Date: _____

Position: _____

Reason for Separation: _____

CRITICAL: 2-HOUR DEADLINE

All system access must be deactivated within 2 hours of separation. Do not wait until end of day.

System Deactivation

System	Deactivated	Time	By
InsurGrid	☐	____:____	_____
Agency Zoom	☐	____:____	_____
PL Rater	☐	____:____	_____
AMS360	☐	____:____	_____
RingCentral	☐	____:____	_____
Carrier Portals	☐	____:____	_____
SIAA Portal	☐	____:____	_____

Pipeline & Policy Reassignment

☐ All Agency Zoom pipeline leads reassigned to: _____

☐ All AMS360 policies reassigned to: _____

☐ All pending endorsements and open activities reviewed

☐ Customers with active quotes contacted within 48 hours

☐ Carriers notified to remove departed producer's authority

Security

☐ All administrative passwords changed as a precaution

☐ Building/office access revoked (keys, fob, codes)

Equipment Recovery

☐ Laptop collected — Asset #: _____

☐ Phone collected

☐ Agency-branded materials collected

☐ All physical files/documents returned

Completed By (Tyler Davis): _____ **Date / Time All Items Complete:** _____