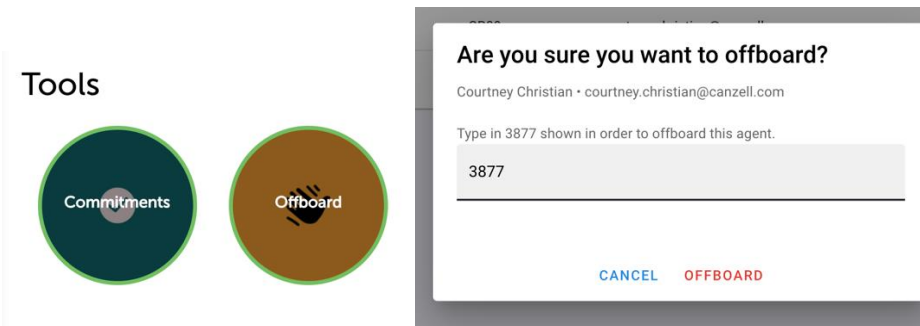


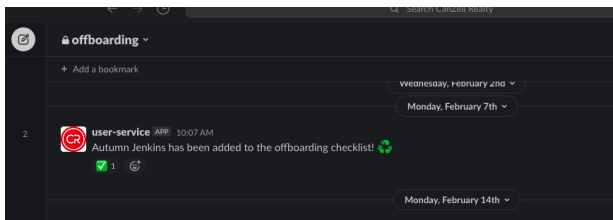
## OFFBOARDING GUIDE

Once an agent has notified of offboarding, they need to be added to the checklist immediately and all items must be completed ASAP.

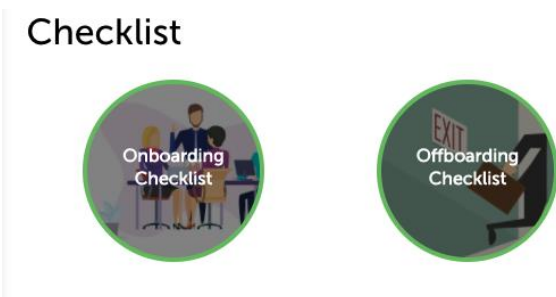
**Step 1:** Add to checklist. On the BOA dashboard, scroll to “offboard.” Search the agent’s name, and type the code shown to add them to the checklist. (Skip if they are already on the checklist/in Slack.)



This will add the agent to the Offboarding checklist, and the Slack “offboarding” channel.

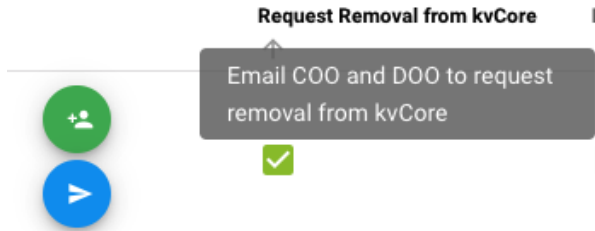


**Step 2:** Go to the Offboarding checklist. On the BOA Dashboard, scroll to checklists and click on the “offboarding checklist” circle.

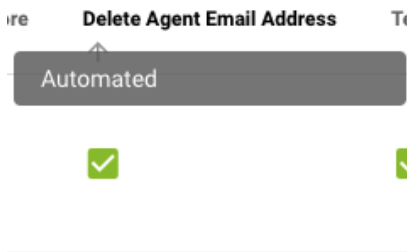


**Step 3:** Get started on the checklist! If you hover over each task, it will give you direction on how to complete it. First, removal from KV CORE.

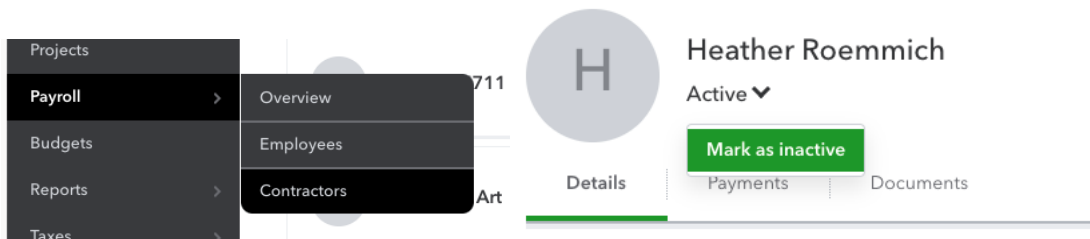
\*This is automatic when you select the box!



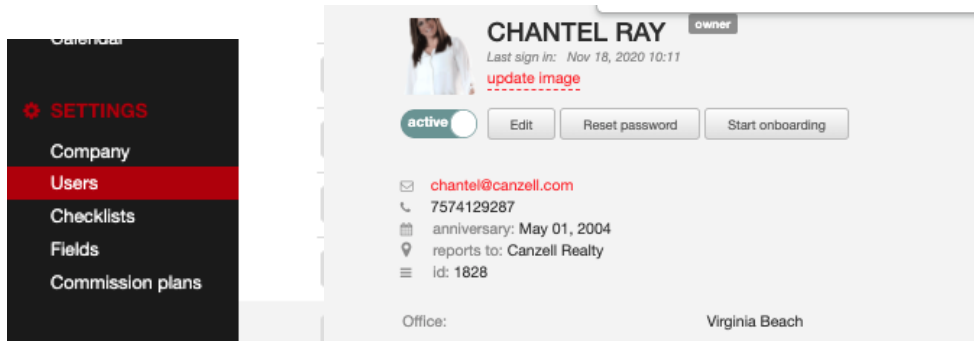
**Step 4:** Delete agent email address. (This is automated – select the box.)



**Step 5:** Make inactive in QuickBooks. Ensure that there are no future payments that will need to be made to agents on upcoming closings. Go to Payroll, Contractors, then search the agent and make them inactive.



**Step 6:** Deactivate user in Brokermint. Select users on the left in Brokermint, search the agents name, and click on the “active” toggle.



**Step 7:** Send license back to DPOR

If the agent is VA, and we have their license: remove it from the licenses, draw a line through, stamp it with the broker’s signature and write “terminated” and the date. Attach the offboarding letter template edited to the agent’s name and date. Scan everything to DPOR and cc boall, and then mail to DPOR.



2/17/2022

Hello,

Please terminate Courtney Jane Miles, license number 0225249759, from Canzell Realty. She is no longer with our firm. Thank you!

Sincerely,

John McLaren  
Canzell Realty  
4598 Broad Street  
Virginia Beach VA 23462

**Step 8:** Email ACC-2 to REIN.

Go to REIN’s website and print an ACC-2 form. Fill out with all information and scan to REIN. See attached example.

**CHANGE FORM**

(Note: This form is to be used to notify REIN of any change in REIN Status, License Status, or Contact Information. A setup fee of \$50 will be invoiced for users who have been inactive for 1 year or more.)

REIN  
Member Services Network

Last Name: MIRY First Name: DOVITA MI: MI  
 REIN User ID #: 08323

**Change in REIN Status:**  Principal Broker  Managing Broker  Agent/Assoc. Broker/Property Manager  
 Licensed Appraiser  Unlicensed Firm/Office Administrative Personnel  
 Unlicensed Agent Assistant – Requires Unlicensed Assistant Application

**Change in Real Estate/Appraiser License Status:**  
 Please select one:  State of Licensure  Virginia  North Carolina

Firm/Office Transfer\* Effective Date: \_\_\_\_\_ ID# \_\_\_\_\_  
 License Returned to Real Estate Board\* Effective Date: 2/17/22  
\*Copy of Letter Used to Return License to Real Estate Board required  
 License Changing from Inactive to Active Status\* Effective Date: \_\_\_\_\_  
\*Exemption of License Fee Form and, if applicable, Letter of Good Standing required  
 Requesting Exemption Status\* Effective Date: \_\_\_\_\_

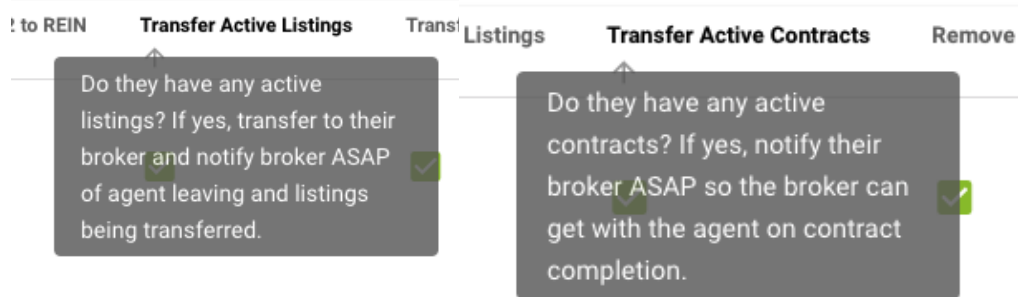
**Change in Contact Information:**  
 Doing Business As Name: \_\_\_\_\_  
 Home Address: \_\_\_\_\_  
 City/State/Zip: \_\_\_\_\_  
 Primary # to Appear on Listings ( ): \_\_\_\_\_  
 Other # to Appear on Roster ( ): \_\_\_\_\_  
 Primary E-MAIL Address: \_\_\_\_\_

> Unlicensed Admin/Assistant Termination of Services, Effective Date: \_\_\_\_\_

**Required Signatures:**

Applicant Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Managing / Principal Broker's / Primary Officer's Signature: JOHN WICK Date: 2/17/22  
 Managing / Principal Broker's / Primary Officer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Firm/Office Name: CONNELL REALTY Firm ID #: 117108  
 ACC-2 (05/20) Return completed & signed form via fax 282-531-7913 or email to customer.service@reinc.com

**Step 9:** Transfer active listings and contracts. Check if the agent has any. Listings will be transferred to the broker, and they must be notified immediately. To release the listing, the agent must pay \$100.



**Step 10: Remove from Opcity.**

Log into Opcity, search the agent's name, and select terminate.

CLOSES	DATE ADDED	ACTIONS
0 Closes	Agent added 02/01/22 5:05 PM	<a href="#">Terminate</a>

**Step 11: Offboard from HRRR (if applicable).** Use the HRRR Licensee report form and fill in the company's information. At the bottom, add the agents name and license number under transfers to another firm.

**LICENSES SENT INACTIVE, TO REFERRAL, OR TRANSFERS TO ANOTHER FIRM**

Name and License Number:

Courtney Miles 0225249759
James Jenkins 0225250712

License To:


**Step 12: Remove agent sponsors.** Remove in Brokermint if agent is sponsored.

Team Site **Remove Agent Sponsors** Remove from |

If the agent is a sponsor of other agents, please remove them. In Brokermint, go to reports on the left hand side. Then click on sponsor agent report. Don't click on the sponsor payout report make sure you click on the sponsor agent report. And then you can filter by the agent or person at the top right. Once you have the list of sponsors, go back to the team site and update all users by remove the off boarding agent as a sponsor from these accounts.

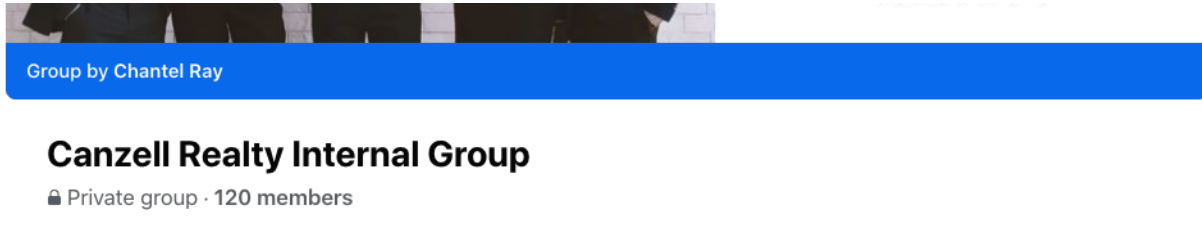
Filter by: hired since sep 01, 2017 - all sponsors -

- all sponsors
- Alison McCarthy
- Allen Stewart
- Ally Hansen
- Amy Bonicoro
- Beryl Plum
- Beth Lynch
- Brenda Andrus
- Brian Dell'Olio
- Brock Peterson
- CJ Miller
- CR

Recruiter efficiency
Recruiter report
Sponsor agent report
Sponsor payout report

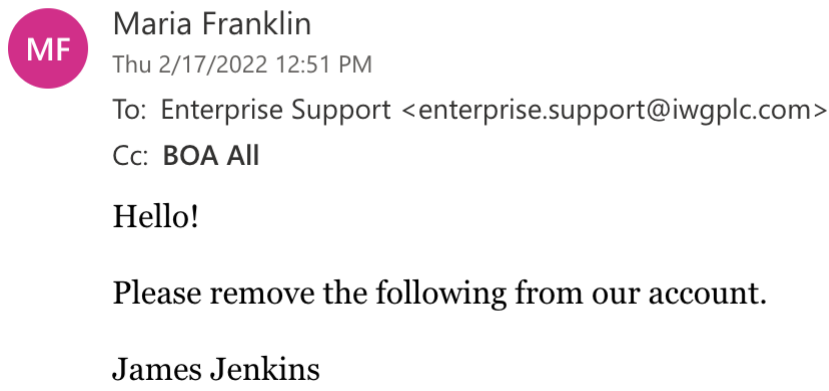
**Step 13:** Remove from Facebook Internal group.

Go to the Canzell Internal Facebook group, select members. Search the agent that is being offboarded and select remove member.

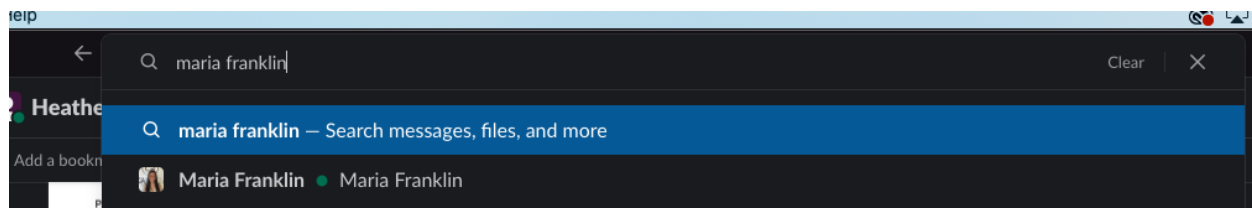


**Step 14:** Remove from Regus account.

Send an email to enterprise support to remove the agent. See example email below.



**Step 15:** Remove from Canzell Slack. Search for the user, click the three dots, and deactivate their account.

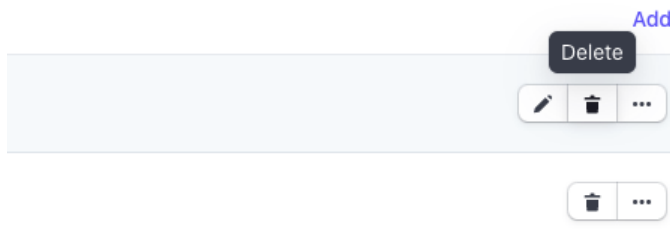


**Step 16:** Cancel Stripe subscription. (Do NOT delete agent).

Log into stripe, search the agent's user, click the "X" next to subscription and cancel.

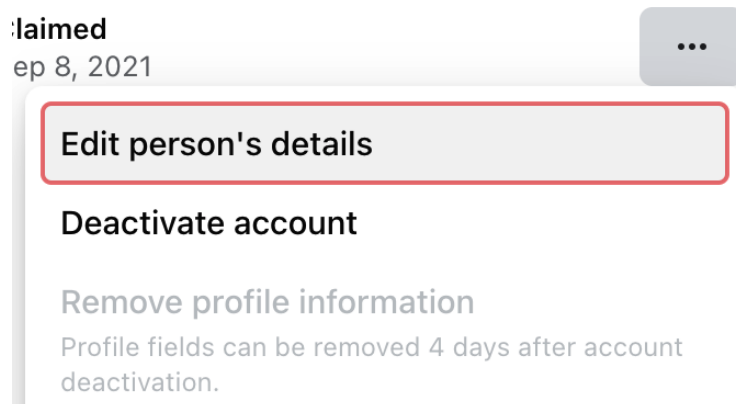


Make sure to scroll to payments and delete both payment methods on file to ensure they will no longer be charged.



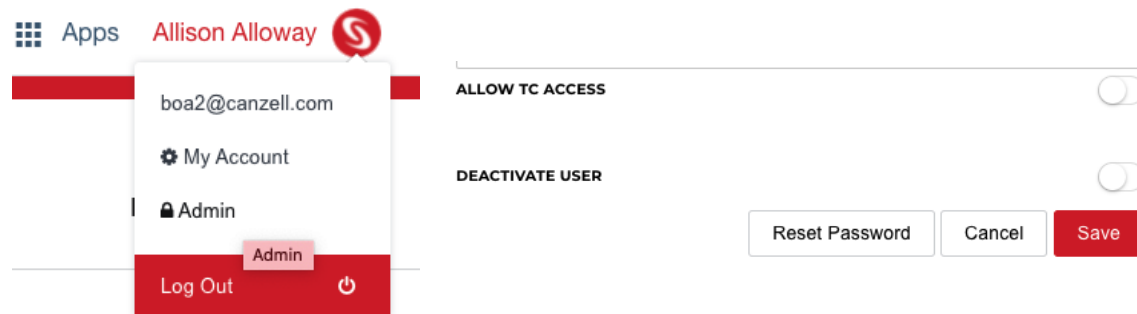
**Step 17:** Remove from Workplace by Facebook.

Log into Workplace, search the agent, and deactivate account.



**Step 18:** Remove from Skyslope.

Go to Admin, select manage agents, search the agent being offboarded, and deactivate the user.



**Step 19:** Where did they go?

Ask the agent if they are going inactive or transferring. If transferring, ask what company they are switching to. On the BOA dashboard, go to the “Where’d they go” circle, and add them to it. Find out why and add that information to their offboarding form as well.



**Step 20:** Inform DOO/COO.

If the agent was in management, make sure to contact DOO and COO to notify to make sure their role is covered.