

Checklist: Employee Termination

Employee name: _____ Department: _____

Termination date: _____

Type of Termination

Voluntary:

- Received employee's resignation letter. (If verbal resignation, provided employee with a written confirmation of resignation).
- Exit interview scheduled. Exit interview completed.

Involuntary:

- Provided employee with termination letter.
- Provided employee with severance agreement if eligible.
 - Received signed severance agreement.
- Provided employee with WARN notice (if applicable).

Benefits

- Provided employee with termination/continuation of employment insurance benefits information (COBRA, life insurance, supplemental insurance, etc.)
- Checked FSA/HSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.
- Checked dependent care FSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.
- Checked PTO balance and informed employee of any remaining PTO and how it will be processed at termination of employment.
- Informed employee about retirement plan account options.

Compensation

- Provided notice of policy regarding any outstanding balances for money owed to company (e.g., educational loans/pay advances).
- Notified payroll department to process final paycheck.
- Informed payroll of any unused but earned PTO amounts due to the employee.

- Notified payroll to process severance pay and whether lump sum or salary continuation (if applicable).

Contracts/Legal

- Provided written notice to employee of any legal obligations that continue post-employment (e.g., noncompete/confidentiality agreements/employment contracts).

Immigration

- Notified company immigration attorney of termination if employee is on a temporary work visa.

Records

- Pulled personnel file to be stored with terminated employee files.
- Pulled Form I-9 to be stored with terminated employees' I-9s.
- Obtained written authorization from employee to respond to employment verification requests.

Information Technology

- Disabled e-mail account.
- Removed employee's name from e-mail group distribution lists; internal/office phone list; website and building directories.
- Disabled computer access.
- Disabled phone extension.
- Disabled voicemail.

Facilities/Office Manager

- Disabled security codes, if necessary.
- Changed office mailbox.
- Cleaned work area and removed personal belongings.
- Collected the following items:
 - Keys (office building desk file cabinets other)
 - ID card
 - Building access card
 - Business cards
 - Nameplate

- Name badge
- Company cell phone
- Laptop
- Uniforms
- Tools
- Other _____
- Other _____

Form completed by: _____ Date: _____