



EMPLOYEE TERMINATION CHECKLIST

Type of Termination

Voluntary:

___ Received employee resignation letter. (If verbal resignation, provided employee with a written confirmation of resignation, retained copy).

___ Scheduled exit interview. ___ Completed exit interview. Email link to employee: <https://goo.gl/forms/ledvPuLO78gWOp1h1>

Involuntary:

___ Provided employee with termination letter (for-cause terminations).

___ Provided employee with severance agreement if layoff and severance eligible.

___ Received signed severance agreement.

___ Provided employee with WARN/OWBPA notices (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 DCAP 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 options.

Compensation

___ Provided notice of policy regarding any outstanding balances for money owed to company: educational loans/pay advances.

Notified Payroll department to process final paycheck.

Informed Payroll of any unused but earned PTO amounts due to employee.

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

Contracts/Legal

Provided letter reminding employee of any legal obligations that continue post-employment (such as noncompete/confidentiality agreements/employment contracts).

Immigration

Notified company immigration attorney of termination if employee is on 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: _____