

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.

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: _____