**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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_