***Employee Termination Checklist***

**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

☐ Name plate

☐ Name badge

☐ Company cell phone

☐ Company cell phone log in, password, Cloud Account, etc.

☐ Laptop

☐ Uniforms

☐ Tools

☐ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

☐ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Form completed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_