

Customize this policy template in the areas written in italics, as well as in any other area, to conform this template to your organization's specific guidelines.

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
 - ☐ Name badge/Building access card
 - ☐ Business cards
 - ☐ Company cell phone
 - ☐ Laptop
 - ☐ Uniforms
 - ☐ Tools
 - ☐ Other _____