Employee Termination Checklist

By Alex Strickland

- ☐ Documentation & Notification
    - ☐ Compile the proper documentation.
    - ☐ Prepare the termination letter.
    - ☐ Notify Human Resources.
    - ☐ Ask employee to write a resignation letter that states he/she is leaving and the termination date.
    - ☐ Notify your network administrator of the date and time on which to terminate the employee's access to computer and telephone systems.
- ☐ Return of Property
    - ☐ Make sure employee returns all company-owned items.
    - ☐ Make sure employee provides his/hers supervisors with passwords and other information pertaining to accessing computer files and telephone messages.
    - ☐ Make sure access to external company databases is removed.
    - ☐ Make sure employee's e-mail account is canceled.
    - ☐ Set automatic e-mail notification to alert sender that employee is no longer employed.
- ☐ Compensation Issues
    - ☐ Determine what 'wages' are owed.
    - ☐ Determine how much vacation has the employee earned.
    - ☐ Determine much vacation has been used.
    - ☐ Prepare information regarding rollover of any 401(k) plans and other benefit information.
    - ☐ Life/Disability Insurance - discontinue premium payments.
    - ☐ Obtain executed copy of employee's final expense report.
- ☐ Exit Interview
    - ☐ Make sure HR office will schedule an exit interview.
    - ☐ Discuss appropriate details regarding termination.
    - ☐ Review confidentiality or proprietary information agreement.
    - ☐ Confirm employee's address for future mailing of information.
    - ☐ Provide employee with a contact person and information for questions arising after the meeting.