Employee Termination Checklist

Description	Department	Complete Y/N
Voluntary Termination		
Received Employee's resignation letter. (If verbal, request the employee put it in writing.)	Human Resources	
Exit Interview Scheduled Exit Interview Support Staff: Voluntary	Human Resources	
Exit Interview Complete	Human Resources	
Involuntary Termination		
Schedule Exit Interview (if possible, HR representative should be present). Staff Termination Exit Interview	Office Administrator	
Provide employee with termination letter. Sample Departure Memorandum	Human Resources	
Provide employee with severance agreement, if eligible.	Human Resources	
Provide employee with WARN notice (if applicable).	Human Resources	
Exit Interview Complete	Office Administrator & HR	
Compensation		
Provided notice of policy regarding any outstanding balances for money owed to company (e.g., educational loans/pay advances).	Finance/Payroll	
Notified payroll department to process final paycheck.	Finance/Payroll	
Informed payroll of any unused but earned PTO amounts due to the employee.	Finance/Payroll	
Notified payroll to process severance pay and whether lump sum or salary continuation (if applicable).	Finance/Payroll	
Benefits		
Provided employee with termination/continuation of employment insurance benefits information (COBRA, life insurance, supplemental insurance, etc.)	Human Resources	
Checked FSA/HSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.	Human Resources	
Checked dependent care FSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.	Human Resources	
Checked PTO balance and informed employee of any remaining PTO and how it will be processed at termination of employment.	Human Resources	
Informed employee about retirement plan account options.	Human Resources	

Description	Department	Complete Y/N
Contracts/Legal		
Provided written notice to employee of any legal obligations that continue post-employment (e.g., noncompete/confidentiality agreements/employment contracts).	Legal	
Information/Technology		
Disabled e-mail account.	IT Technician	
Removed employee's name from e-mail group distribution lists; internal/office phone list; website and building directories.	Web Designer	
Disabled computer access.	IT Technician	
Disabled phone extension.	IT Technician	
Disabled voicemail.	IT Technician	
Facilities/Office Administrator		
Disabled security codes, if necessary.	Facilities	
Collect the following items:		
• Keys	Office Administrator	
• Company Cell Phone	IT	
• Company Laptop	IT	
• ID Card/Badge	Office Administrator	
• Building Access Card	Office Administrator	
• Business Cards	Office Administrator	
Records		
Obtain permanent mailing address for mailing W-2. Make sure employee understands they must notify your office of an address change.	Human Resources	
Obtained written authorization from employee to respond to employment verification requests.	Human Resources	
Pulled personnel file to be stored with terminated employee files.	Human Resources	
Pulled Form I-9 to be stored with terminated employees' I-9s.	Human Resources	

Sourced from Denise Kaback and Kaback Consulting.

Additional Resources

Prepare for Termination: A Guide for Employers
Understanding and Implementing a Performance Improvement Plan (PIP)
Performance Improvement Plan (PIP) Template

Important Note

This checklist offers a foundational guideline for developing your firm's termination policies. Remember to customize it to fit your specific needs and situation.