

# Termination Checklist

---

Employee Name: \_\_\_\_\_

Position/Title: \_\_\_\_\_

Hire Date: \_\_\_\_\_

Termination Date: \_\_\_\_\_

Location: \_\_\_\_\_

## Checklist Items by Termination Type

### *If Voluntary Termination:*

- Written resignation notice received and filed, or written acceptance of verbal notice provided to employee.
- Termination letter provided to employee.
- Exit interview scheduled and completed (optional).

### *If Involuntary Termination:*

- Inform employee of termination decision. Allow the employee an opportunity to gather personal items and take steps to ensure security of co-workers and company property.
- Termination letter provided to employee.
- Severance agreement provided to employee (if applicable – also comply with [Older Workers Benefit Protection Act \(OWBPA\)](#) requirements, if applicable).
- Signed Severance agreement received from employee.

### *If Involuntary Termination Prompted by Layoffs or Closings Affecting 25+ Employees for Employers with 50+ Full-Time Employees*

- As applicable**, and in addition to the involuntary termination requirements above, provide [Federal Worker Adjustment and Retraining Notification \(WARN\)](#) and/or [State WARN \(“Mini-WARN”\)](#) notices to affected employees and required government contacts/agencies within required timeframe prior to termination.

## Checklist Items for All Terminations

### *Compensation:*

- Provide final payment in accordance with applicable state law.
  - Include payout for accrued, unused PTO, vacation, sick, or other leave time in accordance with company policy and state law.

- Review any company policies or laws regarding outstanding balances or cash advances on fringe benefits, loan repayments, uniforms, and overpayments.
- Ensure only lawful deductions from pay are made.
- Ensure severance payments are made (if applicable).

### ***Benefits:***

- Provide information regarding health care continuation per the federal [Consolidated Omnibus Budget Reconciliation Act \(COBRA\)](#) and/or [State COBRA \(“Mini-COBRA”\)](#), if applicable.
- Provide FSA, HAS, and/or retirement benefits information, if applicable.

### ***Continuing Obligations:***

- Note any continuing legal obligations under applicable employment agreements, such as nondisclosure agreements or noncompete clauses (if applicable).
- Provide the separating employee the name of a contact person or human resources for any questions or assistance.

### ***Return of Company Property:***

- Collect mobile devices, laptops, and phones.
- Collect uniforms, badges, and similar items.

### ***Restrict Access:***

- Disable terminated employee’s login credentials and accounts.
- Remove terminated employee’s name from distribution lists and directories.
- Provide forwarding information to coworkers, clients, or contractors (if necessary).
- Remove access to buildings. Collect and/or deactivate access cards, badges, and keys.

### ***Comply with Retention/Storage Requirements:***

- Comply with any immigration requirements regarding temporary visas.
- Ensure employee documents are stored securely and retained for the required period, including I-9s for 3 years after the date of hire or 1 year after employment ends, whichever is later.

Completed by: \_\_\_\_\_

Date: \_\_\_\_\_