

Termination Checklist

Employee Information

Employee Name	Employee Number	Term Date
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If termination is involuntary

Documentation of performance issues and disciplinary action is in employee file.

Before employee's last day of employment

Human Resources <input type="checkbox"/> Prepare COBRA Letter <input type="checkbox"/> Schedule exit interview <input type="checkbox"/> Cancel Stock Options <input type="checkbox"/> Cancel GTL Policy <input type="checkbox"/> Cancel disability policy	Accounting/Finance <input type="checkbox"/> Final paycheck is being prepared. <input type="checkbox"/> Check for final balances on corporate credit card and cancel card. <input type="checkbox"/> Final Expense Reports submitted. <input type="checkbox"/> Final Expense Reports paid.
Office Coordinator/Facilities <input type="checkbox"/> Cancel voicemail account effective employee's last day. <input type="checkbox"/> Request to have employee's network access closed effective employee's last day. <input type="checkbox"/> Have boxes available for employee to pack their belongings.	

Last day of employment

<input type="checkbox"/> Provide COBRA letter & explain - 60 days to elect coverage - 45 days to send in premium for all months since coverage ceased - premium due 1st of the month <input type="checkbox"/> Non-Disclosure Agreement - Provide copy - Explain Non-compete - Retrieve any confidential information <input type="checkbox"/> Vested stock options - 90 days submit the form to exercise. <input type="checkbox"/> Last paycheck (please check one) <input type="checkbox"/> Provided at exit interview OR <input type="checkbox"/> Mailed after termination date	<input type="checkbox"/> Provide 401(k) Withdrawal Form <input type="checkbox"/> Address Changes Verified <input type="checkbox"/> Collect or verify computer system(s) or equipment <input type="checkbox"/> Collect security card/key <input type="checkbox"/> Collect cell phone <input type="checkbox"/> Collect phone card <input type="checkbox"/> Collect corporate credit card <input type="checkbox"/> Exit Interview Questionnaire <input type="checkbox"/> Departure is communicated to staff <input type="checkbox"/> Eligible for rehire? Yes_____ No _____ <input type="checkbox"/> Terminate status in the HRIS system
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After the employee's last day

- Check for any additional amounts owed for commissions, expense reports, fringe benefits, etc.
- Mail final pay stub to former employee if necessary.
- Complete and submit benefit forms to stop coverage with health, disability and group term life carriers
- If former employee submits a request for COBRA coverage, re-enroll using appropriate enrollment forms.

Reason for leaving

Employee Signature

Date

Filename: Document1
Directory:
Template: C:\Documents and Settings\erics.PRC\Application
Data\Microsoft\Templates\Normal.dot
Title:
Subject:
Author: erics
Keywords:
Comments:
Creation Date: 12/17/2007 9:11:00 AM
Change Number: 1
Last Saved On:
Last Saved By:
Total Editing Time: 10 Minutes
Last Printed On: 12/17/2007 9:27:00 AM
As of Last Complete Printing
Number of Pages: 2
Number of Words: 342 (approx.)
Number of Characters: 1,952 (approx.)