

Termination Checklist

Preparation for the Termination Meeting

- Identify a private location.
- Arrange to have one other management employee at the meeting.
- Provide a checklist of company property to be accounted for.
- Prepare all documentation, including benefits information and a final paycheck.
- Contact security and arrange for the employee to leave the work site.
- Create a communication plan for addressing the termination with other employees.

Company Property to Be Returned

- Company vehicle
- Company credit cards
- Company phone cards
- Uniform
- All other company equipment or property (portable phones, pagers, laptop computers, PDAs, etc.)
- Company reference materials (department files, manuals, computer files)

Cancel Permissions Access

- All keys and access cards
- Company ID
- Computer access
- Security codes
- Direct deposit
- Financial read and signature authority
- Petty cash authority
- Parking permit

Financials

- Final expense report received, reviewed, and approved; expense check prepared.
- Final check prepared (includes all accrued vacation pay, sick pay, accrued wages, bonuses, etc.).

Status of Benefits

- Severance pay and general release agreement
- Termination certification
- COBRA election forms
- 401(k) election forms
- Profit-sharing election forms
- Notice of unemployment rights
- Letter outlining the status of benefits upon termination (life insurance, health coverage, retirement plan, and expense account plans)

Review With Employee

- Reason for termination
- Confidentiality or non-compete agreement
- Employee's current contact information
- Written permission for reference checking

Additional Tasks

- Notify human resources, payroll, and security departments of employee's departure.
- Remove employee's name from distribution and phone lists.