

# Employee Exit Process Checklist

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

- Notify Human Resources, in advance, when possible.
- Follow Involuntary Termination Checklist or Voluntary Resignation Process Chart.
  - Require written resignation of not already provided.
- Notify IT and/or Network Administrator, in advance for involuntary terminations.
- Disable building or property access.
- Collect company property:
  - Laptops
  - Mobile Devices
  - Keys or Access Badges
  - Handbooks and/or Manuals
- Review pending projects, assignments to delegate out, work transition plan.
- Collect computer and telephone system passwords/access codes
- Review paid leave balances – voluntary resignation in good standing only.
- Provide guidance related to continuation of benefits coverage.
- Provide employee change of address form to use and return when applicable.
  - Need proper address to mail year end W2.
- Notify Payroll Administrator – remit status change as needed, with final check requests if applicable.
- Notify Benefit Plan Brokers or Carriers.

## EMPLOYEE **INVOLUNTARY TERMINATION** CHECKLIST

1. Path of documentation proves employee knew what was expected
2. Path of documentation proves employee was given a chance to improve
3. For poor performance, termination will not be a surprise
4. For gross misconduct, witnesses and witness statements are available
5. Proper investigation was conducted – employee has told their side of the story
6. Termination is reasonable, appropriate and consistent with prior actions
7. There is no legitimate or job protected reason for the poor performance
8. Authorized HR Approval – HR has reviewed evidence & documentation
9. Employee has not recently engaged in any type of protected activity
10. HR has confirmed there are no pre-termination or job protection rights
11. HR has reviewed/discussed impact considerations with Management Team
12. There are no contractual obligations to be considered
13. Separation Agreement is or is not necessary – Consult Management Team
14. Termination is taking place on business day of/closest to final infraction
15. Proactive security precautions have been taken
16. Silent witness present
17. Company property collected – in presence of authorized representative
18. Personal property collected – in presence of authorized representative
19. Payroll processor notified – abide by final wage payment laws!

## EMPLOYEE **VOLUNTARY** TERMINATION PROCESS CHART

