

Employee Exit Checklist



Employee Name: _____ **Department:** _____ **End Date:** _____

- Voluntary Termination/Resignation
- Involuntary Termination
- Retirement

Separation Reason (select all that apply):

- Career Development
- Personal Health
- Return to School
- Compensation
- Position Funding
- Ineligible for LOA
- LOA/FMLA Expiration
- Working Conditions
- Military Service
- Retirement
- Policy Violation
- End of Temporary Position
- Death
- Other: _____
- Commute
- Misconduct
- Position Elimination
- Lay Off
- Performance
- Relocation

New Address (for W2 Purposes): _____

Comments:

The undersigned hereby agrees that they have returned upon termination of employment for any reason, any and all devices, records, data, notes, reports, lists, correspondence, specifications, documents, materials, equipment, property, or any other such items developed by Employee [and not keep in employee's possession, recreate or deliver to anyone else] pursuant to employment with the organization or otherwise belonging to the organization.

Employee Name: _____ **Date:** _____

Supervisor Name: _____ **Date:** _____

Benefits Checklist

- Provided employee with termination/continuation of employment insurance benefits information (COBRA, life insurance, supplemental insurance, etc.)
- Checked FSA/HSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.
- Checked dependent care FSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.
- Checked PTO/Sick Leave/Vacation/Floating Holidays balance and informed employee of any remaining time and how it will be processed at termination of employment.
- Informed employee about retirement plan account options.

Compensation

- Provided notice of policy regarding any outstanding balances for money owed to the organization (e.g., educational loans/pay advances).
- Notified payroll department to process final paycheck.
- Informed payroll of any unused but earned PTO/Sick Time/Vacation amounts due to the employee.
- Notified payroll to process severance pay and whether lump sum or salary continuation (if applicable).

Contracts/Legal

- Provided written notice to employee of any legal obligations that continue post-employment (e.g., non-compete/confidentiality agreements/employment contracts).

Immigration

- Notified organization immigration attorney of termination if employee is on a temporary work visa.

Records

- Pulled personnel file to be stored with terminated employee files.
- Pulled Form I-9 to be stored with terminated employees' I-9s.
- Obtained written authorization from employee to respond to employment verification requests.

Information Technology

- Disabled email account.
- Removed employee's name from email group distribution lists; internal/office phone list; website and building directories.
- Disabled computer access.
- Disabled phone extension.
- Disabled voicemail.

Facilities/Office Manager

- Disabled security codes, and access cards if necessary.
- Changed office mailbox.
- Work space cleaned and removed personal belongings.

Following Items Collected (As Applicable)

- Keys (office building desk file cabinets other)
- ID card
- Business cards
- Nameplate & Name badge
- Cell phone
- Laptop
- Tools
- Other: _____

Form Completed By: _____ **Date:** _____