*(Editor’s Note: This is a word document. The company should add and/or remove items from this document that are not relevant to the Company’s operations.)*

<Place Your Company Name/Logo Here>

**EMPLOYment termination checklist**

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

Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**1. The following documents must be given to the terminated employee at the time of termination.**

 Notice to Employee as to Change in Relationship (EDD). (Not required, if termination is due to voluntary reasons such as a resignation.)

 EDD for Your Benefit (Form 2320)

**2. Company property to be returned.**

*(Editor’s Note: The following checklist is designed to flag the many operational issues involved in wrapping up an individual’s employment with the Company. This checklist assumes that the decision to terminate has already been made or that the employee has voluntarily resigned.)*

 Blackberry/PDA

 Cell Phone

 Card Key

 Other Keys

 Company Car

 Parking Pass

 Credit Cards

 Telephone Calling Cards

 Home Computer

 Laptop

 Printer/Copier/Scanner/Fax Machine

 Marketing Materials/Other Files

 Company Phone List

 Employee Contact List

 Identification Badges

 Company Provided Uniforms or

Equipment

 Company Provided Gasoline Credit

Cards

**3. Computer-related issues to address.**

*(Editor’s Note: Consider what procedure will be used to quickly facilitate return of Company property and retrieval of employee’s personal property with dignity.)*

 Lock access to system and backup data prior to the notification meeting

 Remove access to external Company databases and/or remote access software

 Review and change all passwords prior to or during the notification meeting

 Set automatic e-mail notification to alert sender that employee is no longer employed

 Transfer/cancel employee’s e-mail account

**4. Determine what “wages” are owed.**

 Discontinue any automatic payroll deposits

 Determine how much vacation the employee has earned up to the date of termination.

 Determine how much vacation has been used

 Pay the employee for accrued but unused vacation up to the “date of termination”.

 The paycheck for an employee being terminated or laid off must be given to them at the moment of termination. The paycheck for an employee voluntarily quitting must be given to them within three calendar days from their notice to resign. *(Editor’s Note: If they notify the employer on Monday of their intent to resign as of that Friday, the paycheck must be given to them that Friday. If they notify the employer on Friday of their intent to resign that day, the paycheck must be available to them by the following Monday.)*

**5. Contributions and/or 401K.**

 What is outstanding? What is vested? What is forfeited?

 Prepare information regarding rollover of any 401(k) plans and notify carrier

**6. Continued Health Insurance Coverage Notice.**

*(Editor’s Note: If PIBT handles your health insurance benefits, the following will be automatically taken care of.)*

 Coordinate preparation of COBRA notice or state law equivalent with health insurance provider

 Confirm that health insurance provider allows coverage through the end of the month of termination

 Confirm that health insurance provider allows employee to be continued under group plan if continued insurance coverage is to be offered in connection with termination

**7. Employee Benefits.**

*(Editor’s Note: If PIBT handles your health insurance benefits, the following will be automatically taken care of.)*

 Life/Disability Insurance — discontinues premium payments and notifies carrier(s) of termination

 Determine if any action should be taken regarding any applicable medical reimbursement or dependent care reimbursement plan

**8. Expense Reports.**

 Obtain a copy of Employee’s final expense report. Make payment on a timely basis.

**9. Operational matters.**

 Remove employee from the Company’s website

 Transfer/cancel employee’s e-mail account

 Set automatic e-mail notification to alert sender that employee is no longer employed

 Change employee’s voicemail message

 Establish a procedure for reviewing incoming e-mail and voicemail

 Prepare to notify the employee’s contacts (i.e., customers, suppliers, etc.)

**10. Signature Authority.**

 Contact bank and others, as applicable, to notify of change in signatory authority

 Consider whether any Board resolutions are necessary to grant authority to other personnel

 Consider if the employee is the trustee for any 401(k) or other benefit programs and notify appropriate parties if employee’s authority needs to be revoked

 Consider whether any creditors need to be notified of change for officer’s certificates, etc.

 Cancel credit card account authorization and request balance and billing statement immediately to determine if improper charges have been made in the prior billing cycle

 Change passwords for online banking and other remote access financial services

**11. Security Issues.**

 Consider whether employee could potentially be volatile and whether security or proper authorities should be called in advance

 Change locks on doors

 Change entry code on keypad locks

**12. Corporate Governance.**

 Does the employee need to resign as an officer or from the board or other positions?

**13. Termination Meeting/Exit Interview.**

 Discuss appropriate details regarding termination (effective date, business and job related reasons for the termination, pay and benefits after termination, if any, unemployment eligibility, etc.)

 Confirm employee’s address for future mailing of information

 Provide employee with a contact person for information or questions arising after the meeting

**14. Company Records/Personnel File.**

 Place completed checklist in Employee’s Personnel file

 Place copy of executed Release Agreement, if applicable, in Employee’s Personnel file

 Place Employee’s separation record in Employee’s Personnel file

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