

# Employee Termination Checklist

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

Title: \_\_\_\_\_

Location: \_\_\_\_\_

Reason for Term: \_\_\_\_\_

Hire Date: \_\_\_\_\_

Term Date: \_\_\_\_\_

Print Stream # \_\_\_\_\_

Eligible for Rehire:  YES  NO

## Involuntary Term:

- Request final check from payroll

## Voluntary Term:

- Resignation Letter
- Exit Interview/COBRA/Last check info
- Remind manager to collect company property (keys/badge/laptop)
- Remind Manager to have employee empty locker

## Spreadsheet Updates:

- Background Check
- PIT
- Employee Telephone Directory

## Intranet:

- Update Department in Company Directory
- Remove name from After Hours Directory
- Update IT After Hours list on IT Support page
- Update Manager photo on Department pages

## Keys:

- Retrieve keys from Manager/employee, put in lockbox
- Update key list
- Update BP Physical Key Distribution spreadsheet and email to VP of IT (master & server rooms keys only)

## Forms:

- Pull I9, file in terminated file
- Complete Payroll Status Change form, give to Payroll

## Benefits:

- Request COBRA letter from WEX
- Remove from VSP site
- Remove from Remodel Health site
- Remove from Delta Dental site (DL only)

## Miscellaneous:

- Submit TrackIt to IT
- ID Badge and laptop returned to IT
- Email Managers and Executive
- Remove mobile number from EX Text site
- Clean office/cubicle
- Update IT After Hours posting on bulletin boards
- Remove Mailbox tag
- Update seating chart PDF
- Verify locker has been emptied, update binder
- Move employee PIT folder to termed folder

## PAYROLL

### Final Check:

Cancel Direct Deposit  
Last check: mail or employee pick up  
Notify garnishments  
Verify balances for PTO and Holiday  
Deduct benefits from last check

### Benefits:

Notify Fidelity for 401K one week after last payroll  
Pull Benefits file, add contents to personnel file  
Pull 401K paperwork, file in 401K Term file

### Spreadsheet Updates:

Benefit: Medical, Dental, FSA, Lincoln  
Hours

### Misc:

Update Paycor to inactive  
Update PrintStream to inactive