

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

Miscellaneous:

- Submit TrackIt to IT
- ID Badge and laptop returned to IT
- Email Managers
- Remove mobile number from EX Text site
- Clean office/cubicle
- Update IT After Hours posting on bulletin boards
- 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