

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
- ☐ Pull Benefits file, add contents to personnel file
- ☐ Pull 401K paperwork, file in 401K Term file

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
- ☐ Email payroll any reporting changes for Paycor
- ☐ Submit TrackIt to IT for any reporting changes

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

Spreadsheet Updates:

Benefit: Medical, Dental, FSA, Lincoln
Hours

Misc:

Update Paycor to inactive