

Employee Termination Checklist

Employee Name: _____

Title: _____

Reason for Termination _____

Hire Date _____

Termination Date _____

Print Stream # _____

Involuntary Term:

- ☐ Request final check from payroll

Voluntary Term (Cristi):

- ☐ Resignation letter
- ☐ Exit Interview/COBRA/Last Check Information
- ☐ Remind Manager to collect ENPOINTE property (keys, badge, laptop cell phones*)
- ☐ Remind Manager to have employee empty locker

Final Check (Todd):

- ☐ Cancel direct deposit
- ☐ How to handle last check? ___Mail ___EE to pick up
- ☐ Garnishments? Notify they are no longer employed
- ☐ Verify balances for ___ PTO ___Holiday
- ☐ Deduct benefits from last check? ___No ___Yes
If yes, Amount \$ _____

Spreadsheet Updates:

- ☐ Benefit: Medical, Dental, FSA, Lincoln (Todd)
- ☐ Hours (Todd)
- ☐ Org Chart (Todd)
- ☐ Background Check (Cristi)
- ☐ PIT (Cristi)
- ☐ Employee Phone Directory (Cristi)

Benefits:

- ☐ Immediately Notify WEX for Flex - check for carryover (Todd)
- ☐ Request COBRA notice from WEX (Todd)
- ☐ Notify Fidelity for 401(k) one week after last payroll (Todd)
- ☐ Pull Benefit file; add contents to personnel file (Todd)
- ☐ Pull 401(k) paperwork, file in "401(k) term" (Todd)
- ☐ Cancel VSP (Cristi)

Keys (Cristi):

- ☐ Retrieve keys from Manager/employee, put in lockbox
- ☐ Update key list
- ☐ Update Brooklyn Park Physical Key Distribution spreadsheet and email to VP of IT

Forms:

- ☐ Pull I-9, file in terminated file (Todd)
- ☐ Completed Payroll Status Form (Cristi)

Locker (Cristi):

- ☐ Update locker binder

Intranet (Cristi):

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

Miscellaneous (Todd):

- ☐ Update PrintStream to "Inactive"
- ☐ Update Paycor to "Inactive"

Miscellaneous (Cristi):

- ☐ Submit Track-It to Notify IT
- ☐ ID Badge & laptop returned to IT
- ☐ Email Managers and Executives
- ☐ Remove mobile number from EZ Text site
- ☐ Clean office/cubicle
- ☐ Update IT After Hours posting on bulletin boards
- ☐ Remove mailbox nametag
- ☐ Update seating chart PDF
- ☐ Verify locker has been emptied
- ☐ Update Active Employee List
- ☐ Move employee PIT folder to termed folder