

Termination Checklist

Below are a few issues to consider in developing a termination checklist. Employers should review any requirements for their industries, and modify this form to meet their requirements.

Reason for Termination: Conduct and Company Policy

- What is the reason for termination? _____
 - Is there a company policy that was violated? [Note: Is the company policy in writing? Has it been distributed to the employee? Is there a signed acknowledgement of the policy in the employee's file?] _____
 - Who was involved in termination decision? _____
 - Review documentation for termination if "for cause" and ensure this documentation is maintained in personnel file.

Final Pay and Accounting

- Prepare employee's final paycheck and ensure that any unused accrued vacation time is also included.
- Commissions, bonuses, or expense reimbursement owed to employee?
 - If calculable at time of termination, must be paid. If not, inform employee when they will be paid.
 - Obtain all expense reimbursement forms from employee.
- Location where final wages paid: _____
 - For employees who quit without 72 hours' notice, and employee requests final check be mailed – has this request been obtained in writing?
- Direct deposit requested by employee? [Note: that after termination, employee must re-authorize direct deposit for final paycheck.]

Company Property and Passwords

- Obtain all company property from employee and reset passwords.
 - Uniform returned?
 - Keys returned?
 - List of all passwords employee had access to:

Severance Agreement Considerations

- Should the company consider offering this employee severance in exchange for a release?
 - Is the employee 40 years old or older? If so, will need a revocation period before payment is made to employee.

Final Notices

- Required notices:
 - **Notice to Employee as to Change in Relationship (download [here](#))**
 - **For your Benefit (Form 2320) (download [here](#))**
 - COBRA and Cal-COBRA Notices from insurance provider
 - Also need to notify insurance provider
 - **Health Insurance Premium (HIPP) Notice (download [here](#))**
- Optional:
 - Final Paycheck Acknowledgement

Employee Files

- Have measures been taken to secure and save employee's file, wage, and time records?