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**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 with the assistance of a qualified attorney.*

**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 form employee.
* Location where final wages paid: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* 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**](http://www.edd.ca.gov/Payroll_Taxes/pdf/NoticetoEmployeeastoChangeinRelationship.pdf)**)**
		- **For your Benefit (Form 2320) (download** [**here**](http://www.edd.ca.gov/pdf_pub_ctr/de2320.pdf)**)**
		- COBRA and Cal-COBRA Notices from insurance provider
		- Notify insurance provider
		- **Health Insurance Premium (HIPP) Notice (download** [**here**](https://www.dhcs.ca.gov/services/Documents/DHCS_9061_ENGLISH_9-15.pdf)**)**
	+ Final Paycheck Acknowledgement

**Employee Files**

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

Employers need to be careful to potential WARN and Cal-WARN issues if laying of a substantial number of employees at the same time. More information can be found here: https://www.californiaemploymentlawreport.com/2020/03/governor-newsom-signs-executive-order-regarding-cal-warn-and-coronavirus-what-employers-need-to-know/

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