TERMINATION OF EMPLOYEMENT WORKSHEET

EMPLOYEE NAME: _____

DATE OF TERMINATION: _____

The following items should be checked off prior to an employee's final date of employment. Not all items will apply to all employees or all circumstances. Place the completed form in the employee's personnel file.

Actions	Done
Termination Notice	
Meet with the employee in a private, neutral location, such as a conference room or closed office, to minimize their embarrassment or discomfort.	
Inform the employee why they are being fired or laid off.	
Explain when the termination will be effective. If today is the employee's last day, outline the procedures for exiting the premises. If the employee will remain at the company for a set period of time, tell them what is expected of them during the transition period.	
Give the employee a termination letter that documents their last day, outlines the reasons they are no longer working for the company, and provides information about severance benefits and other termination details.	
Insurance and Benefits	
Disclose the date that the employee's medical, dental, vision, life and long-term disability insurance coverage will end.	
Explain COBRA, the federal act that provides employees who experience a "qualifying event" (such as a termination) with the right to continue their current group insurance coverage.	
Give the employee a written statement that explains when their benefits will terminate, outlines COBRA law, lists monthly premiums and provides enrollment information.	
Provide a closing statement with information about the company's stock option, profit sharing and/or employee stock-ownership program. The statement should show how many shares the employee has vested, the price per share and the deadline for exercising the shares.	
Give the employee documentation about their 401(k) or retirement savings plan. Make sure it spells out when company contributions to the plan will end, explains rollover options and contains contact information for the plan administrator.	
Settlement and Arbitration Agreements	
Ask the employee to sign an arbitration agreement that states that all controversies and employment-related disputes will be resolved through arbitration and not litigation.	
If you're concerned about possible litigation, ask the employee to sign a settlement agreement. By signing such a document, the employee releases any claims against the company in exchange for payment. (Consult your attorney or an employment-law specialist to determine if a settlement	

agreement is necessary.)	
Give the employee photocopies of the signed agreements or ask them to sign duplicate copies.	
Paycheck, PTO Payout and Severance	
If today is the employee's last day, give them their final paycheck along with a check for accrued vacation or paid time off (PTO).	
Discuss any severance the employee will receive and explain how it will be paid out.	
Severance Pay and General Release agreement offered.	
Give the employee a letter that explains the terms of the severance package.	
Company-Owned Equipment	
Computer Company software returned	
Company cellular phone returned	
Company pager returned	
Company credit card returned	
Company phone card returned	
Employee identification card returned	
Building/office keys and access cards	
Parking permit or garage key	
Bank depository keys	
Uniforms	
Company vehicles returned	
Have the employee sign a document that states that they have returned all company property	
Expense and Transition Reports	
Instruct the employee to complete a final expense report and submit it on or before their last day	
If the employee will remain at the company for a set period of time, ask them to provide a transition report that details the projects they're working on.	
Exit Interview and Employee Assistance	
Conduct an exit interview (if appropriate) to learn from the employee's experience at the company	
Ask the employee if they have any questions or final comments	
Discuss any outplacement services or employee assistance the company will offer	
Exit interview given	
Exit interview prepared	
Office Operations	
Discontinue the employee's email account and network access	
Change sensitive access codes, including bank PINs and security codes	
Cancel phone and voicemail accounts	
Change locks	
Cancel appropriate magazine, newsletter and newspaper subscriptions	
Staff Notification	
Notify employees, clients and vendors about the termination and tell them who will handle the terminated employee's responsibilities	
Answer questions and concerns your staff has about the termination without disclosing any sensitive information or infringing on the terminated person's privacy	
Human Resources, Payroll and Security Departments have been notified of employee's departure	

Final expense report received, reviewed and approved, expense check prepared	
Final check prepared (includes all vacation pay, sick pay, accrued wages, bonuses, etc.)	
Notice of unemployment rights provided	
Termination Certification signed	
Profit sharing election forms provided.	
Company documents and files inventoried.	
Desk and working premises inventoried.	
Company has no further liability with the terminated employee.	

Supervisor's Signature:_____ Date: _____

Department:_____ Date:_____