

Employee Information

Employee Name	Employee Number	Term Date
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If termination is involuntary

Documentation of performance issues and disciplinary action is in employee file.

Before employee's last day of employment

Human Resources	Accounting/Finance
<input type="checkbox"/> Prepare COBRA Letter	<input type="checkbox"/> Final paycheck is being prepared.
<input type="checkbox"/> Schedule exit interview	<input type="checkbox"/> Check for final balances on corporate credit card and cancel card.
<input type="checkbox"/> Cancel Stock Options	<input type="checkbox"/> Final Expense Reports submitted.
	<input type="checkbox"/> Final Expense Reports paid.
Office Coordinator/Facilities	
<input type="checkbox"/> Cancel voicemail account effective employee's last day.	
<input type="checkbox"/> Request to have employee's network access closed effective employee's last day.	

Last day of employment

<input type="checkbox"/> Provide COBRA letter & explain - 60 days to elect coverage - 45 days to send in premium for all months since coverage ceased - premium due 1st of the month <input type="checkbox"/> Non-Disclosure Agreement - Provide copy - Explain Non-compete - Retrieve any confidential information <input type="checkbox"/> Vested stock options - 90 days submit the form to exercise. <input type="checkbox"/> Last paycheck (please check one) <input type="checkbox"/> Provided at exit interview OR <input type="checkbox"/> Mailed after termination date	<input type="checkbox"/> Provide 401(k) Withdrawal Form <input type="checkbox"/> Address Changes Verified <input type="checkbox"/> Collect or verify computer system(s) or equipment <input type="checkbox"/> Collect security card <input type="checkbox"/> Collect cell phone <input type="checkbox"/> Collect phone card <input type="checkbox"/> Collect corporate credit card <input type="checkbox"/> Exit Interview Questionnaire <input type="checkbox"/> Departure is communicated to staff <input type="checkbox"/> Eligible for rehire? Yes _____ No _____ <input type="checkbox"/> Terminate status in the HRIS system
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After the employee's last day

<input type="checkbox"/> Check for any additional amounts owed for commissions, expense reports, etc. <input type="checkbox"/> Mail final pay stub to former employee if necessary. <input type="checkbox"/> Complete and submit benefit forms to stop coverage with Aetna and
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Fortis.

If former employee submits a request for COBRA coverage, re-enroll using enrollment forms. (Refer to COBRA process document.)

Reason for leaving

This checklist was originally created by SHRM (Society for Human Resource Management) and is free to re-use. I have made small changes in terms of formatting and verbiage.