

## TERMINATION CHECKLIST

The information contained in this Termination Checklist is based on best practice guidelines and intended for reference purposes only. Additions or modifications may be needed due to specific circumstances within your organization and must be considered within the context of this material. Termination documents are legal documents. The information contained in these guidelines does not constitute legal advice or a legal opinion and is not intended as an alternative to seeking appropriate legal or other professional advice.

Pre-Termination	YES	NO	N/A
Employee File Preparation – all documentation leading to and regarding the termination.			
Prepare the termination letter detailing the terms of the departure (i.e. notice and severance pay, vacation pay, health and life benefits continue and for how long, transition service details, last submission date for business expenses, confidentiality, employee release, etc.)			
Prepare for the termination discussion. Confirm a private meeting space is available.			
Confirm who will be present during the termination (witness).			
Confirm what company assets are to be returned.			
Confirm options for an alternate way for the employee to get home, if needed.			
Ensure a dignified exit from the building, confirming everyone's safety.			
Brief all parties involved in the termination process.			
<b>During the Termination Process</b>			
State clearly and briefly the reason and purpose of the meeting. (i.e., the unfortunate business decision to terminate employment effective immediately or alternate time).			
Request all access keys or cards from the employee (i.e. to the building, filing cabinets, parking lot, credit cards, etc.).			
Arrange for the safe return of company-owned equipment, and intellectual property (e.g. cellular phone, laptop, pager, tools, designs formulas, etc.).			
Confirm passcodes and access details that may not be known.			
Arrange for the employee's necessary personal belongings to be picked up prior and brought to the employee prior to the departure and balance of any items to be picked up in private if necessary, after termination.			
Arrange for a safe departure.			
<b>Directly After the Termination</b>			
Secure company property and assets.			
Notify immediate team members.			
Notify the broader team/company as required.			
Notify the Payroll Department.			
Notify the benefits, pension, and other relevant providers.			
Ensure all documentation has been put in the employee's file.			
<b>Later Follow up</b>			
Follow up with employee's business contacts.			
Retrieve/store all relevant electronic equipment and data files.			
Go through all paper files.			
Check-in with remaining employees for work clarification and coping.			
Enlist professional guidance to resolve any termination concerns. Update Payroll and providers with any changes.			