**TERMINATION CHECKLIST FOR HR**



Employee Name: Job Title:

Department: Last Day Worked:

Reason for Termination: D Resignation D Layoff D Discharge D Retirement

D D Other:

# Items to be returned

D I.D. Badge D Credit Cards D Company Financial Info

D Building Keys/Access Card D Tools/Uniforms D Company Files

D Desk/File Keys D Safety Equipment D Company Manuals

D Computer/Laptop D Customer Lists D Designs, Formulas, etc.

D Cell Phone D Price Lists D Company Vehicle

D Palm Pilot D Calling Cards

D Other:

# Information to be reviewed with exiting employee

Agreements:

D Employment Agreement

D Non-compete and non-solicitation Agreement

D Intellectual Property Agreement

D Confidentiality Agreement

Pay and Benefits:

D COBRA D Health/Flexible Spending Account Balance: $ D Life Insurance Continuation D Vacation/PTO Balance and/or Conversion D Sick Time D Pension/401(k), 401(k) Loans D Severance Pay (if applicable) $ D Outplacement (if applicable) D Expense/Reimbursement Account Balance $ D Unemployment Insurance (if applicable) D Travel Advance Balance $ D HSA/HRA D Misc. Unpaid Balance (safety equipment, etc.)$ D Other

# Persons to notify

D Receptionist D Information Systems D Credit Union

D Payroll D Professional Associations D Cell Phone Provider

D Security D Union D Credit Card Provider

D Other:

# Things to do

D Obtain signed Termination Notice (if applicable)

D Pull files (personnel, benefits, medical, etc.) and update HRIS record

D Pull I-9

D Schedule exit interview

D Check company reports against employee participation (credit cards, special programs, etc.) D Prepare COBRA, HIPAA notices, notify Third Party Administrator, notify insurance providers D Request final check(s) for wages, vacation and other legally required compensation

D Assemble 401(k) termination forms and check for outstanding loan

D Other

Human Resources Representative Date Completed

The Employers Association, 5570 Executive Parkway, SE, Grand Rapids, MI 49512