

Employment Termination Checklist

Employee Name: _____

Date: _____ Date of Termination: _____

Notification

_____ **Official Notice:** If an employee tells you of their intention to leave your employment, ask them to write a resignation letter that states they are leaving and their termination date. (Request a minimum of two week's notice, when possible and desirable.)

Permissions / Access Termination

_____ **Notify Your Network Administrator:** As soon as you know that an employee is leaving, notify your Network Administrator or other appropriate staff person of the date and time on which to terminate the employee's access to computer and telephone systems. All personal files should be removed from the computer by the employee before their termination date. Arrange for access to office files on employee's computer.

_____ **Disable employee building or property access:** Effective on the termination date, whether immediate in a firing situation, or at a mutually agreed upon end date, you need to terminate the employee's building access. Depending on your access methods, you will need to disable the employee's building entry code, disable the entry swipe card, or collect the employee's keys. It is in both your best interest and the former employee's that he or she cannot access any company property.

Return of Property

_____ **Return of company property:** Exiting employees are required to turn in all company books and materials, keys, ID badges, computers, cell phones and any other company-owned items.

_____ **Passwords:** Employees should provide their supervisors with passwords and other information pertaining to accessing computer files and telephone messages. (You may want to keep email and phone accounts active for awhile to field customer contacts.)

Status of Benefits

_____ **Vacation pay and unused sick time:** Terminating employees are paid out unused, accrued vacation leave on their final paycheck. We do not pay out unused sick leave.

_____ **Benefits status:** Following termination, employees must be informed of the status of their benefits upon termination. This includes life insurance, dental/vision coverage, ancillary products and retirement plan. (In the United States, organizations comply with the Consolidated Omnibus Budget Reconciliation Act of 1980 (COBRA), and extend to eligible employees and their enrolled dependents the right to continue dental/vision plan coverage for a specified period of time at their own expense and at full cost. This is sent to employees by the dental/vision company.)

_____ **Repayment of advances:** Any unpaid payroll advances will be subtracted from the employee's final check.

_____ **Payment of money owed the employee:** Any unpaid expenses for company business purposes (turned in on an expense report), unpaid commission and bonuses will be paid in the final pay check.

Confidentiality and Non-compete Agreements

_____ **Review of confidentiality agreement:** Any confidentiality agreement or non-compete agreement that the exiting employee signed when commencing employment should be reviewed to make certain the employee understands what is expected.

Exit Interview

_____ **Confidential exit interview:** Exiting employees are encouraged to participate in a confidential exit interview. (Exit interviews are an important process for gathering information regarding the working environment. When notified that an employee is terminating employment, schedule an exit interview. All information gathered is confidential and should be used to improve business processes. (sample attached)

_____ **Grievance Policy:** Exiting employees should have a copy of the grievance policy, whether they are terminating voluntarily or not. This includes retirement. Signature of receipt should be signed below.

_____ **Have the employee update their address.** Especially to alleviate location issues during tax season as W-2s will come back as non-deliverable if the address has changed. Without new contact information, it is difficult to provide needed information to the former employee. As a backup, verify that the employee's emergency contact information is up-to-date and that you can contact that person to locate them if you have trouble getting their W2s to them.

Follow-up

_____ **Send COBRA form to Diocese Human Resource office.** HR needs to change benefit information and ensure benefit termination is processed correctly. Please do this immediately to avoid sending unnecessary benefit payments for terminated employees.

I, _____, (employee signature)
have received a copy of the Diocesan Grievance Policy.

_____ Date