



Employee Separation Checklist

Free Employee Separation Checklist with AI customization. Industry-specific guidance for employee separation checklist. Build your checklist now.

Separation Initiation

- ☐ Document separation type (voluntary/involuntary)
- ☐ Record effective date
- ☐ Note reason for separation
- ☐ Review company policies
- ☐ Consult with HR/Legal
- ☐ Prepare separation agreement
- ☐ Calculate notice period
- ☐ Plan announcement strategy
- ☐ Document performance issues (if applicable)
- ☐ Review legal requirements
- ☐ Consider severance eligibility
- ☐ Update records immediately

Legal & Compliance

- ☐ Review employment contract
- ☐ Check non-compete agreements
- ☐ Verify non-disclosure obligations
- ☐ Assess unemployment eligibility
- ☐ Prepare COBRA notifications
- ☐ Issue required notices
- ☐ Document separation properly
- ☐ File government reports
- ☐ Update compliance records
- ☐ Prepare reference policy
- ☐ Address pending complaints
- ☐ Secure signed releases

Transition Management

- ☐ Identify coverage needs
- ☐ Reassign responsibilities
- ☐ Transfer project ownership
- ☐ Update client assignments
- ☐ Notify affected parties
- ☐ Document work status
- ☐ Create transition timeline
- ☐ Brief replacement/team

- ☐ Transfer authorities
- ☐ Update signatures
- ☐ Reassign committees
- ☐ Close open items

Final Compensation

- ☐ Calculate final wages
- ☐ Process accrued vacation
- ☐ Determine sick leave payout
- ☐ Calculate commissions due
- ☐ Process bonus if eligible
- ☐ Compute severance package
- ☐ Deduct any advances
- ☐ Process final expenses
- ☐ Calculate deductions
- ☐ Prepare final paycheck
- ☐ Document all calculations
- ☐ Issue pay statements

Benefits Termination

- ☐ End health insurance
- ☐ Process COBRA paperwork
- ☐ Terminate life insurance
- ☐ End disability coverage
- ☐ Stop retirement contributions
- ☐ Calculate vesting
- ☐ Cancel FSA/HSA contributions
- ☐ End other benefits
- ☐ Provide benefits summary
- ☐ Explain continuation options
- ☐ Process rollovers
- ☐ Update beneficiaries

Property Collection

- ☐ List all company property
- ☐ Collect identification badges
- ☐ Retrieve keys and cards
- ☐ Return electronic devices
- ☐ Collect software/manuals
- ☐ Retrieve vehicles (if applicable)
- ☐ Return uniforms/equipment
- ☐ Collect confidential documents
- ☐ Clear desk contents
- ☐ Remove personal items
- ☐ Document returns

- ☐ Assess any damages

System Deactivation

- ☐ Disable computer access
- ☐ Close email account
- ☐ Revoke database access
- ☐ Remove from systems
- ☐ Cancel software licenses
- ☐ Disable phone access
- ☐ Remove from websites
- ☐ Close accounts
- ☐ Change passwords
- ☐ Update access lists
- ☐ Remove permissions
- ☐ Archive user data

Exit Procedures

- ☐ Conduct exit interview
- ☐ Gather feedback
- ☐ Address concerns
- ☐ Discuss transition
- ☐ Review obligations
- ☐ Provide references policy
- ☐ Get forwarding address
- ☐ Update contact information
- ☐ Thank for contributions
- ☐ Maintain professionalism
- ☐ Document discussion
- ☐ Close relationship positively

By WriteVoice.io - Talk, don't type. It's 4x faster