



Employee Termination Checklist

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

Pre-Termination Planning

- ☐ Document performance issues thoroughly
- ☐ Review progressive discipline records
- ☐ Consult with HR department
- ☐ Seek legal counsel if needed
- ☐ Review employment agreement
- ☐ Check state/local requirements
- ☐ Prepare termination documentation
- ☐ Plan termination meeting
- ☐ Arrange witness presence
- ☐ Prepare final paycheck
- ☐ Review security concerns
- ☐ Plan communication strategy

Legal Considerations

- ☐ Verify at-will employment status
- ☐ Review discrimination risks
- ☐ Check protected class status
- ☐ Document legitimate business reasons
- ☐ Avoid wrongful termination claims
- ☐ Consider litigation risks
- ☐ Prepare separation agreement
- ☐ Include release of claims
- ☐ Offer severance if appropriate
- ☐ Review unemployment impact
- ☐ Comply with WARN Act
- ☐ Follow company policy

Termination Meeting

- ☐ Schedule private meeting
- ☐ Have HR representative present
- ☐ State decision clearly
- ☐ Keep meeting brief
- ☐ Avoid debate or negotiation
- ☐ Explain effective date
- ☐ Review final pay details
- ☐ Discuss benefits ending

- ☐ Request property return
- ☐ Explain COBRA rights
- ☐ Provide necessary documents
- ☐ Maintain dignity and respect

Immediate Actions

- ☐ Escort from premises if necessary
- ☐ Collect company property immediately
- ☐ Disable computer access
- ☐ Deactivate security badges
- ☐ Change locks if needed
- ☐ Secure confidential information
- ☐ Retrieve company vehicle
- ☐ Cancel company credit cards
- ☐ Remove from premises
- ☐ Notify security personnel
- ☐ Block facility access
- ☐ Secure work area

Documentation Requirements

- ☐ Complete termination form
- ☐ Document termination reason
- ☐ File separation notice
- ☐ Prepare service letter
- ☐ Issue COBRA notice
- ☐ Provide unemployment information
- ☐ Give final pay stub
- ☐ Document property return
- ☐ Secure signed acknowledgments
- ☐ Update personnel file
- ☐ Maintain confidentiality
- ☐ Store records properly

Final Pay Processing

- ☐ Calculate regular wages
- ☐ Add accrued vacation
- ☐ Include earned commissions
- ☐ Process within legal timeframe
- ☐ Make proper deductions
- ☐ Issue paper check or deposit
- ☐ Provide detailed statement
- ☐ Document payment
- ☐ Report to payroll
- ☐ Update systems
- ☐ Close payroll records

- ☐ File tax documents

Communication Management

- ☐ Notify team immediately
- ☐ Inform key stakeholders
- ☐ Communicate with clients
- ☐ Update vendors
- ☐ Brief remaining staff
- ☐ Address team concerns
- ☐ Maintain confidentiality
- ☐ Avoid disparagement
- ☐ Redirect inquiries to HR
- ☐ Update directories
- ☐ Remove from communications
- ☐ Manage external messaging

Post-Termination Tasks

- ☐ Process unemployment claims
- ☐ Respond to verification requests
- ☐ Provide neutral references
- ☐ Monitor legal deadlines
- ☐ Maintain documentation
- ☐ Address final issues
- ☐ Process COBRA elections
- ☐ Handle benefits questions
- ☐ Manage appeals if any
- ☐ Learn from experience
- ☐ Update policies if needed
- ☐ Close all matters

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