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Sample Termination Checklist

Please note that these checklists are to be used as a guide for terminations; however variations or additional steps may apply.

Terminations

Termination is when an employee departs from an organization; it is the end of the employment relationship.

- ❑ Review details of the termination situation with human resources and/or legal counsel, as required.
- ❑ Determine the date benefits coverage and insurance will cease.
- ❑ Notify the benefits provider and insurer / complete and submit benefit and insurance forms to terminate coverage.
- ❑ Determine and pay vacation for accrued days.
- ❑ Ask the employee to return:
  - o Office keys/codes/swipe cards
  - o Company supplies (cell phone, credit card, laptop)
  - o Parking pass
  - o Passwords
  - o Documents

- ❑ Disconnect computer access.
- ❑ Remove / redirect employee's email access and voicemail.
- ❑ Remove building access.
- ❑ Ensure final expense reports are submitted and paid.
- ❑ Prepare final paycheque.
- ❑ Provide Record of Employment (ROE) after final paycheque is issued.
- ❑ Update phone directories, staff lists and website.
- ❑ Communicate employee departure to staff.
- ❑ Reassign files / projects.

Specifics for Voluntary Termination

Voluntary termination is when an employee initiates the termination by resigning from his or her job.

- ❑ Schedule and conduct an exit-interview, if the employee is willing to do so, in a private meeting room.

Provided for reference only.
Always consult current legislation in your jurisdiction to create policies and procedures for your organization.

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Specifics for Involuntary Termination

Involuntary termination is when an employer initiates the termination either with or without cause.

- ❑ Ensure that a private meeting room or office is available for the meeting where there will be no interruptions. (A neutral location is best.)
- ❑ Schedule a meeting with the employee.
- ❑ Prepare and sign all documentation (i.e. termination letter).
- ❑ Prepare notes and/or practice what you will say at the meeting.
- ❑ Have two people (including a witness) present at the termination meeting.
- ❑ Inform the employee of the reason for their termination (with or without cause) and effective dates.
- ❑ Provide and review the termination letter with the employee.
- ❑ Ensure the employee signs the release form, if applicable.
- ❑ Make arrangements for the employee to collect their personal belongings. This can be done immediately or schedule a later time (possibly after hours to allow some privacy).
- ❑ Notify the Information Technology department to disconnect computer access. For security purposes, generally employees are not allowed to access their computers following their termination.
- ❑ Offer to have any personal files on their computer downloaded for the employee to pick up at a later time.
- ❑ Ensure the employee can get home safely. The employee may not be in the right mental state to drive; therefore, consider offering a drive home by someone else, a taxi chit, etc.)