

Template 10: Sample Employee Exit Checklist

Employee name:	
Organization:	
Termination date:	

Type of termination

- ☐ **Voluntary/Retirement:**
 - ☐ Received employee's resignation/retirement letter. (If verbal resignation, provided employee with a written confirmation of resignation).
 - ☐ Acknowledged employee's resignation/retirement letter
 - ☐ Exit interview scheduled.
 - ☐ Exit interview completed.
- ☐ **Involuntary:**
 - ☐ Provided employee with a termination letter.
 - ☐ Provided employee with severance agreement if eligible.
 - ☐ Received signed severance agreement.
 - ☐ Obtained legal release

Benefits

- ☐ Provided employee with termination/continuation of employment insurance benefits information (e.g., Health and life insurance, supplemental insurance, etc.), if applicable.
- ☐ Checked vacation and overtime balance and informed employee of any remaining leave and how it will be processed at termination of employment.
- ☐ Informed employee about retirement plan account options, if applicable.

Compensation

- ☐ Provided notice of policy regarding any outstanding balances for money owed to company (e.g., educational loans/pay advances).
- ☐ Notified payroll department to process final paycheque and record of employment.
- ☐ Informed payroll of any unused but earned vacation or other paid time off due to the employee.
- ☐ Notified payroll to process severance pay and whether lump sum or salary continuation, if applicable.

Contracts/legal

- ☐ Provided written notice to employee of any legal obligations that continue post-employment (e.g., noncompete/confidentiality agreements/employment contracts).

Records

- ☐ Pulled employee file to be stored with terminated employee files.
- ☐ Obtained written authorization from employee to respond to employment verification requests.

Information technology

- ☐ Disabled e-mail account and transferred to replacement, if applicable.
- ☐ Removed employee's name from e-mail group distribution lists; internal/office phone list; website and building directories.
- ☐ Disabled computer access.
- ☐ Transferred or disabled landline or cell phone extension.
- ☐ Disabled voicemail.
- ☐ Obtained list of email contacts.

Financial management

- ☐ Retrieved, reconciled, and cancelled corporate credit card, if applicable.
- ☐ Removed/changed signing authority on bank account, if applicable.
- ☐ Obtained list and contact information of suppliers and customers.

Facilities/office management

- ☐ Disabled security codes, if applicable.
- ☐ Changed office mailbox
- ☐ Removed access to post office box or retrieved post office key, if applicable
- ☐ Cleaned work area and removed personal belongings.
- ☐ Ensured transfer of electronic and paper files and records belonging to the organization.
- ☐ Collected the following items:
- ☐ Keys (☐ office ☐ building ☐ desk ☐ file cabinets ☐ other)
- ☐ ID card
- ☐ Building access card
- ☐ Business cards
- ☐ Nameplate
- ☐ Name badge
- ☐ Company cell phone
- ☐ Laptop
- ☐ Uniforms
- ☐ Tools and equipment
- ☐ Other _____
- ☐ Other _____

Form completed by:	
Date:	