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:
  - Office keys/codes/swipe cards
  - Company supplies (cell phone, credit card, laptop)
  - Parking pass
  - Passwords
  - 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.
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.)