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<p>Retiree health insurance on the wrong track? Extend Health can help!</p>	<p>Learn How ▶</p>	
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Termination: Checklist

Welcome David Fogarty ▼

Employee Information

Employee Name	Employee Number	Term Date
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If termination is involuntary

Documentation of performance issues and disciplinary action is in employee file.

Before employee's last day of employment

<p>Human Resources</p> <ul style="list-style-type: none"> <input type="checkbox"/> Prepare COBRA Letter <input type="checkbox"/> Schedule exit interview <input type="checkbox"/> Cancel Stock Options 	<p>Accounting/Finance</p> <ul style="list-style-type: none"> <input type="checkbox"/> Final paycheck is being prepared. <input type="checkbox"/> Check for final balances on corporate credit card and cancel card. <input type="checkbox"/> Final Expense Reports submitted. <input type="checkbox"/> Final Expense Reports paid.
<p>Office Coordinator/Facilities</p> <ul style="list-style-type: none"> <input type="checkbox"/> Cancel voicemail account effective employee's last day. <input type="checkbox"/> Request to have employee's network access closed effective employee's last day. 	

Last day of employment

<ul style="list-style-type: none"> <input type="checkbox"/> Provide COBRA letter & explain - 60 days to elect coverage - 45 days to send in premium for all months since coverage ceased - premium due 1st of the month <input type="checkbox"/> Non-Disclosure Agreement - Provide copy - Explain Non-compete - Retrieve any confidential information <input type="checkbox"/> Vested stock options - 90 days submit the form to exercise. <input type="checkbox"/> Last paycheck (please check one) <ul style="list-style-type: none"> <input type="checkbox"/> Provided at exit interview OR <input type="checkbox"/> Mailed after termination date 	<ul style="list-style-type: none"> <input type="checkbox"/> Provide 401(k) Withdrawal Form <input type="checkbox"/> Address Changes Verified <input type="checkbox"/> Collect or verify computer system(s) or equipment <input type="checkbox"/> Collect security card <input type="checkbox"/> Collect cell phone <input type="checkbox"/> Collect phone card <input type="checkbox"/> Collect corporate credit card <input type="checkbox"/> Exit Interview Questionnaire <input type="checkbox"/> Departure is communicated to staff <input type="checkbox"/> Eligible for rehire? <ul style="list-style-type: none"> Yes _____ No _____ <input type="checkbox"/> Terminate status in the HRIS system
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After the employee's last day

Check for any additional amounts owed for commissions, expense reports, etc.
 Mail final pay stub to former employee if necessary.
 Complete and submit benefit forms to stop coverage with Aetna and Fortis.
 If former employee submits a request for COBRA coverage, re-enroll using Aetna enrollment forms. (Refer to COBRA process document.)

Reason for leaving

Employee Signature

Date

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Questions? Contact SHRM
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