##### **Employee Termination Checklist**

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## Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Type of Termination**

*Voluntary:*

* Receive employee resignation letter. (If verbal resignation, provide the employee with a written confirmation of resignation. Practice should retain copy of verbal resignation confirmation given to the employee).

 \_\_\_ Schedule exit interview.

 \_\_\_ Complete exit interview.

*Involuntary – Position Eliminated or Layoff:*

* Review reason for termination with supervisor.

 \_\_\_ Provide information about unemployment benefits.

 \_\_\_ Confirm the employee’s contact information such that the practice can reach the employee if reinstatement is possible. The practice may indicate that re-hire may only be feasible if another position becomes available that matches the employee’s skill set.

 \_\_\_ Schedule exit interview.

 \_\_\_ Complete exit interview.

*Involuntary – For Cause:*

* Review reason for termination with supervisor. Review personnel file and items below:

\_\_\_ Termination won’t be a surprise to employee or there is a clear reason for the termination.

\_\_\_ There are credible facts and documentation to support the termination decision.

\_\_\_ Termination is consistent with the way other similarly situated employees have been treated.

\_\_\_ Employee has been given adequate notice of the rules/performance expectations and the consequences.

\_\_\_ Employee has been given an opportunity to explain, rebut statements, and influence the employer’s decision before the decision to discipline or terminate.

\_\_\_ The practice’s discipline policy been followed.

* Determine if legal counsel is needed prior to termination.
* Hold termination meeting:

\_\_\_ Ensure a second manager is present as a witness.

\_\_\_ For a performance-related termination meeting with employee, inform the employee in a straightforward and sensitive manner that his or her employment is being terminated – simply and without detail (i.e., unsatisfactory job performance).

**Benefits**

* Provide employee with termination/continuation of employment insurance benefits information (COBRA, life insurance, supplemental insurance, etc.) If a 3rd party administrator manages COBRA, provide employee with their contact information, and have the vendor also reach out to the employee.
* Check FSA/HSA participation and inform employee of remaining funds and reimbursement deadlines, if applicable.
* Check PTO balance and inform employee of any remaining PTO and how it will be processed at termination of employment.
* Inform employee about retirement plan options.

**Compensation**

* Outline calculations of final paycheck and provide a written notice of what is included and deducted from pay.
* Provide notice of policy regarding any outstanding balances for money owed to the company: educational loans/pay advances.
* Notify payroll company to process final paycheck. If the practice runs payroll, perform calculations in advance of meeting to hand their employee final check during termination meeting.
* Inform payroll of any unused but earned PTO amounts due to employee.
* Notify payroll to process severance pay and whether lump sum or salary continuation (if applicable).
* Confirm correct current address and telephone number for employee and ask to be advised if either change within the next year (for mailing of W-2 or for other occasions when former employees may need to be contacted).

**Confidentiality Agreement/Legal**

* Provide letter reminding employee of any legal obligations that continue post-employment (such as patient confidentiality agreements, intellectual property, noncompete clauses, or employment contracts).

**Employee Personnel Files**

* Pull personnel file to be stored with terminated employee files.
* Pull Form I-9 to be stored with terminated employees’ I-9s.
* Obtain written authorization from employee to respond to employment verification requests.
* If voluntary or involuntary layoff, obtain written authorization from employee to provide references for future employers.
* If employee is leaving on good terms, consider providing a letter of recommendation for the employee to use when seeking a new position.

**Information Technology**

* Disable e-mail account.
* Remove employee’s name from e-mail group distribution lists; internal/office phone list; website and building directories.
* Change passwords to practice’s social media accounts if employee had access or helped maintain the practice’s website.
* Disable computer access to main log-in, electronic health records (EHR), practice management system (PM), and any other computer programs used by the practice.
* Notify vendors if employee had access to bank accounts, third-party billing information, ability to order supplies, etc.
* Disable phone extension.
* Disable voicemail.
* Cancel building security codes.

**Facilities and Practice Property**

* Ensure the terminated employee returns the following items:

\_\_\_ Keys (\_\_\_office, \_\_\_building, \_\_\_desk, \_\_\_file cabinets, \_\_\_ other)

\_\_\_ Employee uniforms (lab coats or scrubs provided by the practice)

\_\_\_ Books or other continuing education materials

\_\_\_ Parking passes

\_\_\_ Practice credit cards

\_\_\_ Building access card. If the practice’s building doors can be opened by a keypad, be sure to change the code.

\_\_\_ Business cards (if applicable)

\_\_\_ Company cell phone (if applicable)

\_\_\_ Laptop or other electronic equipment provided to work at home

\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

* Post Termination Meeting:

\_\_\_ Complete payroll form and deliver to payroll immediately for processing

\_\_\_ Complete COBRA form and any other necessary termination forms

\_\_\_ Send in cancellation forms for medical, life, and dental insurance

\_\_\_ Update company roster and directories.

\_\_\_ Other (specify below):

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## *Supervisor Signature Date*

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*Witness Signature*  *Date*