

Separation from Employment Checklist

Insert Company Name

Insert Employee Name

Insert Employee Mailing/Home Address

Insert Employee Phone Number

Click here to enter a date

Date Last Worked

HR Tasks to Complete

Completed?	Description	Date Completed
<input type="checkbox"/>	Exit Interview ¹	Click here to enter a date
<input type="checkbox"/>	Review Employer Property Return Agreement	Click here to enter a date
<input type="checkbox"/>	Review Confidentiality/Nondisclosure Agreement	Click here to enter a date
<input type="checkbox"/>	Final paycheck issued	Click here to enter a date
<input type="checkbox"/>	Distribute all required forms (below)	Click here to enter a date
<input type="checkbox"/>	Contact IT Department re. disabling employee access	Click here to enter a date

Forms to Provided to Employee at Separation of Employment²

Need to Use?	Form Description	Given to	Date ... Signed Copy Received	Sent to Outside Party
<input type="checkbox"/>	COBRA Continuation Coverage Election Notice	Click here to enter a date	N/A	N/A
<input type="checkbox"/>	Acknowledgement of Receipt of Notification of COBRA Rights	Click here to enter a date	Click here to enter a date	N/A
<input type="checkbox"/>	Notice to Carrier of Qualifying Event (send to Plan Administrator)	N/A	N/A	Click here to enter a date
<input type="checkbox"/>	Cal-COBRA Notice to Carrier (send to Plan Administrator)	N/A	N/A	Click here to enter a date
<input type="checkbox"/>	HIPP Notice (Form DHCS 9061)	Click here to enter a date	N/A	N/A
<input type="checkbox"/>	Unemployment Insurance Pamphlet (Form DE 2320)	Click here to enter a date	N/A	N/A
<input type="checkbox"/>	Notice to Employee of Change in Relationship	Click here to enter a date	Click here to enter a date	N/A
<input type="checkbox"/>	Final Paycheck Acknowledgement	Click here to enter a date	Click here to enter a date	N/A

Return of Company Property by Employee³

Does employee have any Company property?

Yes

No

Issued?	Description	Date Employee Returned
<input type="checkbox"/>	Cell Phone/Smart Phone/Pager	Click here to enter a date
<input type="checkbox"/>	Laptop/Tablet	Click here to enter a date

¹ If necessary

² All signed acknowledgements should be placed in the employee's personnel file

³ If applicable

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- | | | |
|--------------------------|---|--|
| <input type="checkbox"/> | Company Credit Cards/Gas Cards/Phone Cards | Click here to enter a date |
| <input type="checkbox"/> | Keys (Building, Locker, Files, Office etc.) | Click here to enter a date |
| <input type="checkbox"/> | Company Vehicle | Click here to enter a date |
| <input type="checkbox"/> | Customer Lists | Click here to enter a date |
| <input type="checkbox"/> | Company Files/Documents | Click here to enter a date |
| <input type="checkbox"/> | Uniforms | Click here to enter a date |
| <input type="checkbox"/> | Computer Books, Software | Click here to enter a date |

IT Tasks to Complete⁴

Completed? Description

- | | |
|--------------------------|-------------------------------------|
| <input type="checkbox"/> | Computer Password Disabled |
| <input type="checkbox"/> | Network Access Disabled |
| <input type="checkbox"/> | Voice Mail System Changed |
| <input type="checkbox"/> | Emails/Phone Calls Forwarded |
| <input type="checkbox"/> | Alarm/Building Access Codes Changed |

Date Completed

- | |
|--|
| Click here to enter a date |
| Click here to enter a date |
| Click here to enter a date |
| Click here to enter a date |
| Click here to enter a date |

⁴ If necessary