

Sample Exit Checklist

Name: _____

Position: _____

Supervisor: _____

Department: _____

Hire Date: _____

Termination Date: _____

Exit Interview scheduled for _____ at _____ with _____.

Information to be discussed with the employee prior to departure:

	Yes	No	Not Applicable	Notes
Medical benefits/COBRA	___	___	___	_____
Life insurance conversion	___	___	___	_____
Severance pay	___	___	___	_____
Vacation/sick pay due	___	___	___	_____
Pension/savings plan funds	___	___	___	_____
Education assistance reimbursements	___	___	___	_____
Expense reports/other Reimbursements	___	___	___	_____
Unemployment compensation (if applicable)	___	___	___	_____
Computer security process	___	___	___	_____
Confidentiality, non-competition, and non-solicitation agreement	___	___	___	_____
Procedure for providing references	___	___	___	_____
Eligibility for reemployment	___	___	___	_____
Process for receiving final paycheck	___	___	___	_____
Other _____	___	___	___	_____
Other _____	___	___	___	_____

Items to be returned by employee:

	Returned	Not Applicable	Notes/password
Electronic equip: Computer(s), including disks/thumb drives/USBs, portable hard drives & other storage devices or medium	___	___	_____
Paper copies of company documents	___	___	_____
Key(s)/key cards - building/office/file cabinets/cars	___	___	_____
Security pass/ID card	___	___	_____
Parking pass/access key	___	___	_____
Credit card(s)	___	___	_____
Phone calling card	___	___	_____
Cellular phone (if employee owned is it necessary to wipe company data)	___	___	_____
Mobile hotspot	___	___	_____
Passwords to account, devices, sites	___	___	_____

Tools/other equipment	___	___	_____
Employee handbook/company information	___	___	_____
Uniform(s)	___	___	_____
Pager	___	___	_____
Other_____	___	___	_____
Other_____	___	___	_____

Technology-related issues:

	Completed	Not Applicable	Notes
Transition/close electronic communication systems	___	___	_____
Disable remote access	___	___	_____
Disable email account	___	___	_____
Grant manager access to email	___	___	_____
Enable out-of-office notice	___	___	_____
Remove voice-mail from system	___	___	_____
Make voice-mail available for manager	___	___	_____
Remove from website	___	___	_____
Change passwords/access to accounts	___	___	_____
Change social media profiles	___	___	_____
Other	___	___	_____

Other procedures to follow:

	Completed	Not Applicable	Notes
Notify payroll and obtain/send final paycheck	___	___	_____
Notify security office	___	___	_____
Notify credit union/company store/other_____	___	___	_____
Notify health insurance provider	___	___	_____
Notify life insurance provider	___	___	_____
Process pension/savings forms	___	___	_____
Review and close out personnel file	___	___	_____
Modify HRIS records	___	___	_____
Notify appropriate contacts	___	___	_____
Staff announcement of departure	___	___	_____
Other	___	___	_____

Checklist Reviewed by: _____

Date: _____

Place completed checklist in employee file

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