

TERMINATE EMPLOYEE CHECKLIST

Employee Name _____

GENERAL INFORMATION

FORWARDING Address for W2s: _____

FORWARDING City, State Zipcode for W2s: _____

SSN: _____

Phone Number: _____

Email address: _____

Job Title / Department / Supervisor: _____

Last Day Worked: _____

Hire Date: _____

FINAL PAY RATES AND PAYCHECK

Final Salary: _____

Final Paycheck:

Vacation/PTO Paid:
(Required)

Severance Paid:

Final Hourly Rate: _____

Date: _____

Date: _____

Date: _____

Other: _____

\$Amount _____

\$Amount _____

\$Amount _____

BENEFITS

Benefits Broker Notified

COBRA explained (by you or Broker)

COBRA Election Date: _____

Total COBRA \$ Amount: _____

Keep on File COBRA Election Forms

If NO COBRA, Medical Insurance Terminated

401k/403b Terminated

Unemployment Insurance information provided

HR TO DO'S

Record Reason for Termination: Lack of Work/Laid Off Quit

Discharge/Fire _____

Keep on File Resignation Letter and/or Documentation of Incidents with dates leading to Termination

Exit Interview Returned Keys Returned _____ _____

Document Critical Information (such as procedure for doing a task)

Cancel/Transfer Memberships & Periodicals _____

Delete Accounts/Logins & Change Passwords _____

Revoke Access to Bank & Other Institutions _____

Consult Legal Counsel for Employment Laws applicable to you (Ex: Release of Claims for Severance Paid)

Reconcile the Employee's Benefits

Other: _____

TERMINATE EMPLOYEE IN EASYTRACK

1. In your payroll account, navigate to the employee's page
2. Under Job >> Employment, scroll to the bottom of the page and click Terminate
3. Fill in the details of the Termination and click Schedule Termination
4. Change the Employment Status to Inactive