



Sample Employment Separation Checklist

Employee Name: _____

Employee Identification Number: _____

Voluntary Separation (Resignation):

1. Accept copy of formal resignation letter for file. ☐
2. Prepare and distribute post departure notice. ☐
 - a. If your practice, schedule a departure event (lunch or cake on the employee's last day).
3. Last day of work, collect the following; ☐
 - a. Company equipment (e.g., cell phones, laptops, tools, car, uniforms).
 - b. Collect passwords and files. Review partially finished projects and ensure all files are in the proper location for others to finish work.
4. Ensure that the employee collects their personal belongings. ☐
5. Complete separation paperwork for benefits and payroll ☐
 - a. Prepare and send a separation letter.
 - b. Prepare and send COBRA notice, if applicable.
 - c. Notify security and IT to deactivate accounts and forward emails, if appropriate, to the supervisor.
 - d. File paperwork in personnel files.
 - e. Move I-9 for destruction per your documentation retention schedule.

Involuntary Separation:

- Start-Process at Step 3 above. ☐
 - If you can, collect any system passwords.
If you cannot, work with IT to capture passwords/files.
 - Depending on the circumstances, you may have to mail personal items to the employee.
- If **volatile termination**, consider having security present to escort individual off-premise. ☐
- Notify staff and employees who need to know of the separation. ☐