



# HR Solutions for Small Business, LLC

Stacey Etherson

The "HR-Lady" for Nonprofits & Small Businesses

## Organization/Employee Exit Checklist

The purpose of this checklist is to outline key steps to manage a termination from your small business or nonprofit organization. It can be customized to meet your needs. The intent is to provide a smooth transition for the company, staff and the individual leaving employment.

Step	Action	Date/Time
__ 1.	For voluntary terminations, jointly work with the employee regarding the final day worked. Consider the steps below.	
__ 2.	For involuntary terminations, decide the date and time for the termination. Determine which of the steps below, or others, need to be planned ahead including the timing. Decide if safety of staff or resources is a concern and plan.	
__ 3.	Understand in advance what projects or work is in progress. Decide who will absorb those responsibilities and where possible, have the terminating employee share information, documents, history, etc. for a smooth transition.	
__ 4.	Decide who needs to be notified, the timing and how (email, phone call, or in person). What input can the Business Administrator or Technology provide?  __ Business Administrator/HR __ Technology __ Front Desk or Security __ Staff __ Internal clients _____  __ External constituents _____  _____	

Box 865

Monroeville, PA 15146

412-580-8249

[stacey@HR4SmallBus.com](mailto:stacey@HR4SmallBus.com)

[www.linkedin.com/in/staceyetherson](http://www.linkedin.com/in/staceyetherson)

HR Solutions for Small Business, LLC © 2018

__ 5.	Decide on how and when the employee will collect personal belongings. Decide if a staff member needs to be present to ensure only personal items are removed.	
__ 6.	Notify technology to cancel access to internal systems, email, logon id and passwords. Or, have technology forward internal emails to a supervisor. Is access from home technology a concern? What date and time will these occur? For involuntary terminations, these can occur while the discussions are taking place. For voluntary terminations, these can occur at the end of the last day of employment. Which approach works for you?	
__ 7.	<p>On the last day worked collect company property (decide who collects these).</p> <p><input type="checkbox"/> Keys to office, desk, building, other</p> <p><input type="checkbox"/> Cell phone, walk-talkie, PC, other technology</p> <p><input type="checkbox"/> Company credit card(s)</p> <p><input type="checkbox"/> Policy handbook</p> <p><input type="checkbox"/> Company identification cards, badges or fobs</p> <p><input type="checkbox"/> Other company property _____</p>	
__ 8.	Payroll/Business Administrator: When will the employee receive the final pay? How (same as regular pay)? What does employee need to know about benefits/Cobra? Does employee have outstanding invoices on a company credit card? Is employee owed any money for purchases on personal credit card? Has employee followed the required approval processes for reimbursement or filing expenses? Will unused vacation or PTO be paid out and if so how many days?	
__ 9.	Is there a document for the employee to sign to acknowledge they followed company policies and procedures during the termination including returning company property?	
__ 10.	Is the final pay withheld until the company has confirmation that procedures have been followed and company property returned? Date of final pay _____	
__ 11.	Other factors to consider. How will you celebrate the person's time with the company?	