Employee Separation Checklist



Employee separation is never easy, but with the right preparation, it can be done with compassion and respect. Utilizing an Employee Separation Checklist can be a good starting point to help you follow best practices, maintain consistency, and protect your business. You may need to seek advice from legal counsel or other professional advisor in certain situations — like during a company layoff or when there's a safety concern involving employees or others.

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Before the Separation Meeting

- ☐ Review relevant documentation, such as performance reviews, warnings, or disciplinary actions.
- ☐ Consult with your HR department, legal counsel or other professional advisor, where applicable, to review reason for separation and company policy.
- ☐ Draft a separation letter, where appropriate.
- ☐ Plan the meeting — where and when it will take place, what you'll say, and who should attend.
- ☐ Prepare the final paycheck in accordance with applicable laws.
- ☐ Create a transition plan to identify who will take over the employee's responsibilities.
- ☐ Gather documentation to provide to the departing employee, such as required notices and benefits information.
- ☐ Schedule deactivation of employee access to IT systems, buildings, etc.

During the Separation Meeting

- ☐ Conduct the meeting with respect and empathy.
- ☐ Review separation details, such as compensation and benefits information, how and when company property will be collected, retrieval of personal belongings, provision of future references, and provision of required notices such as COBRA or State Unemployment Insurance information.
- ☐ Ensure you have the employee's updated contact information for sending any necessary tax forms or separation documents.

After the Separation Meeting

- ☐ Inform staff and clients as appropriate of the departure without disclosing sensitive details.
- ☐ Contact insurance carriers, COBRA administrator, and payroll provider where applicable.
- ☐ Conduct an exit interview, where applicable.
- ☐ Retain all applicable documents and files in accordance with recordkeeping requirements.
- ☐ Review the employee separation process and identify areas for improvement.



Handle These Difficult Situations With Care Using Paychex

Navigating employee separations can be a complex and sensitive task, but you don't have to do it alone. With Paychex, get the support you need to confidently handle every step.

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