

Separation Checklist - Voluntary Quit

Purpose/Summary

The following are checklists to ensure proper documentation and steps are taken when an employee voluntarily chooses to separate from its job. The checklists are broken down by reasons for separation.

Product

Unemployment Process – Checklists

Details

The following are checklists an employer can use to ensure proper steps and documentation when an employee chooses to separate. Click on a link below to be taken to that specific separation reason checklist:

General

Health Reasons

During Assignment

Return to School

**Accepting Assignment;
Did Not Report**

Retirement

Abandonment or Walked Off Job

General

Exit interview - confirmation of reasons for quit	Previous expressions of dissatisfaction If Yes: - Discussions with others documented - Actions taken to resolve employee complaints documented
Notice given	Mutual Agreement If Yes: - Employee would have been discharged anyway If Yes: - See Discharge Checklists
Resignation Letter	Employee know about policy (See Policy Violations in Discharge Checklists)
Work conditions changed If Yes: - Details of charge documented - Job duties - Pay - Hours - Location - Other - Documented	Job abandonment or did not show If Yes: - Employee contacted employer about absence and reason documented If No: - Company policy about contacts regarding absences

*Mutual Agreement - when employees resign under the threat of termination, states will generally view the separation as a Discharge. Therefore, employers should treat such resignations as if they discharged the employee. Go to the Discharge checklist and make sure you have the corresponding documents related to the incident which led to the resignation.

During Assignment

Details of assignment are in file (start and end date, hours, rate of pay)	Employee would have been given another assignment
Reasons given by employee in file - Verbally - In writing	Employee performed this type of assignment before

Accepted Assignment; Did Not Report

Date of acceptance in file	Employee contact about absence If Yes: • Reasons for failure to report in file
Written acceptance	Terms and conditions of offer: • Type of work similar to prior assignment(s) • Type of work indicated by employee to be acceptable • Pay • Hours • Location or area

Abandonment or Walked Off Job

Company policy about notification of absences	Employee communications about absence • Written • Verbal (details are needed such as date and to whom the employee spoke to)
Employee knew about policy	Key Dates needed • Failed to show • Decision to terminate • Last day of actual work
Employee signed acknowledgment	Witnesses and contact information (if applicable)
Employee's action violated policy If Yes: • See Discharge - Policy Violations	Details of events prior to walking off the job

Health Reasons

Doctor's statement If No: • Employee's explanation of health issues	Light-duty offered
Confirmation of reasons	Leave of absence available
Light-duty approved	Employee is able and available to work

Return to School

Temporary job	Full-time, employment would have continued If Yes: Expected end date recorded
Full-time job	Currently enrolled

Retirement

Voluntary	Pension paid upon retirement
Mandatory If Yes: - Position being eliminated - Company policy - Employee aware of policy - Signed acknowledgment	Pension details documented, such as amount, allocation (weekly, monthly)

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The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.