Involuntary Termination Checklist

Use for every involuntary termination, including dismissals for performance, conduct, attendance and failed probation. For layoffs, use the layoff process instead. Each item has an owner: HR, the manager (M), IT or payroll (P). Keep the completed checklist in the confidential HR file, not the general personnel file.

1. BEFORE THE DECISION IS FINAL (HR REVIEW)

- [ ] Reason for termination stated in one or two factual sentences
- [ ] Policy, performance standard or attendance rule involved identified, with a copy of the version the employee acknowledged
- [ ] Prior warnings, coaching notes or PIP documents on file and dated
- [ ] Employee was told about the problem and had a reasonable chance to correct it (unless serious misconduct)
- [ ] Investigation notes and the employee's side of the story recorded (for misconduct)
- [ ] Comparison with how similar cases were handled in the last 12–24 months
- [ ] Check for recent protected activity: complaint, harassment report, leave request or FMLA leave, workers' compensation claim, accommodation request, pregnancy, safety or whistleblower report, union activity
- [ ] Employee age 40 or over noted (affects severance release terms)
- [ ] Employment contract, offer letter or collective bargaining agreement checked for notice, cause or procedure terms
- [ ] Visa, equity, commission or bonus plans checked for termination effects
- [ ] Legal counsel consulted where any risk factor above applies
- [ ] Final approval from the manager's manager and HR recorded with date

2. PREPARING THE MEETING

- [ ] Date, time and private room (or video call link) booked; avoid the employee's birthday, the day before a holiday and the end of a long shift
- [ ] Two company attendees confirmed: the manager who delivers the news and an HR witness
- [ ] Termination letter drafted, reviewed and printed or ready to email
- [ ] Final paycheck amount and payment date confirmed with payroll, meeting state deadlines
- [ ] Benefits end date and COBRA process confirmed with the benefits administrator
- [ ] State-required separation or unemployment notices prepared
- [ ] Severance offer and separation agreement prepared, if offering one
- [ ] List of company property the employee holds (laptop, phone, badge, keys, cards, tools, uniforms)
- [ ] IT briefed to disable access at a set time during the meeting; shared passwords and admin rights identified
- [ ] Plan for personal belongings (escort to desk now, pack and ship, or pickup appointment)
- [ ] Plan for how the team and customers will be told, and who covers the work

- [ ] Security or site management notified only if there is a real safety concern

3. TERMINATION MEETING SCRIPT

Opening (M): "[Employee Name], thanks for coming in. I have a difficult decision to share with you. We have decided to end your employment, effective today."

Reason (M), one or two sentences: "As we discussed on [Date of Final Warning / PIP Review], [brief factual reason, e.g. attendance has continued to exceed the policy limit / the performance targets in your improvement plan were not met]. The decision is final."

Next steps (HR): "I will go over what happens next. Your final paycheck, including [hours worked through today / accrued PTO where applicable], will be paid [on Date / by Method]. Your health coverage ends on [Benefits End Date], and you will receive information about continuing it under COBRA. [We are also offering severance; the agreement and the time you have to review it are in this packet.] This letter covers all of this in writing."

Property and belongings (HR): "Please hand over your [badge, laptop, phone, keys] now. [I will walk with you to collect your personal items / We will pack and ship your belongings to your home address by Date.]"

Questions (HR): "What questions do you have about pay, benefits or the next steps? You can also reach me at [Phone / Email] after today."

Close (M): "I appreciate the work you did here, and I wish you well."

If the employee argues: "I understand you disagree. The decision has been made, and I am not going to debate it today. Let's go through the practical details so you have what you need."

4. SAME DAY

- [ ] IT disables network, email, VPN, building and application access at the agreed time (IT)
- [ ] Company property collected and checked against the list (HR / M)
- [ ] Termination letter delivered and receipt acknowledged, or refusal noted with a witness (HR)
- [ ] Employee's personal email and home address confirmed for final documents (HR)
- [ ] Payroll instructed with final hours, PTO payout and any deductions allowed by state law (P)
- [ ] HRIS status changed, with termination reason code and rehire eligibility (HR)
- [ ] Meeting notes written and signed by both company attendees (HR / M)
- [ ] Team told briefly and factually, without details of the reason (M)
- [ ] Schedules, queues, routing and customer assignments updated (M)

5. WITHIN THE FOLLOWING WEEK

- [ ] Final paycheck delivered on or before the state deadline (P)
- [ ] COBRA election notice sent by the plan administrator within the required time (HR)
- [ ] 401(k), FSA, HSA and life insurance conversion information sent (HR)
- [ ] Outstanding expense reports, commissions and bonuses processed under plan rules (P)
- [ ] Personal belongings returned or picked up (HR)
- [ ] Email forwarding or auto-reply set up, mailbox and files transferred to the manager (IT)

- [ ] Unreturned property followed up in writing (HR)
- [ ] Separation agreement deadline calendared; signed agreement and revocation period tracked (HR)
- [ ] Unemployment claim response filed accurately and on time (HR)
- [ ] File closed: letter, checklist, meeting notes and signed documents stored (HR)

SIGN-OFF

Employee name and ID

Termination date

Termination type

- [ ] Performance
- [ ] Conduct / policy violation
- [ ] Attendance
- [ ] Failed probation
- [ ] Job abandonment
- [ ] Other

Eligible for rehire

- [ ] Yes
- [ ] No
- [ ] Review required

HR representative signature

Date

Manager signature

Date

Date checklist completed