

## PRACTITIONER TOOL

# Termination Readiness Checklist

*The essential questions to answer before a termination is approved.*

Termination decisions carry the highest legal, financial, and cultural risk in the entire people-management process.

**Use it with HR. Use it every time. Use it consistently.**

A defensible termination requires five ingredients: **Consistency. Documentation. Notice. Opportunity to Improve. HR/Legal Approval.** If one is missing, you may be opening yourself up to unemployment compensation claims or a lawsuit.

## DOCUMENTATION REVIEW

*Confirm you have a complete, factual, chronological record.*

Question	Yes	No
Has the issue been clearly documented?	<input type="checkbox"/>	<input type="checkbox"/>
Are records factual, specific, and free of subjective language?	<input type="checkbox"/>	<input type="checkbox"/>
Are coaching and feedback conversations documented?	<input type="checkbox"/>	<input type="checkbox"/>
Does documentation show a clear pattern, not a single incident (unless severe)?	<input type="checkbox"/>	<input type="checkbox"/>
Were expectations clearly communicated in writing?	<input type="checkbox"/>	<input type="checkbox"/>
Did the employee have reasonable time to improve?	<input type="checkbox"/>	<input type="checkbox"/>

## PROCESS CONSISTENCY

*Ensuring fairness and alignment with company standards.*

Question	Yes	No
Has the employee gone through appropriate steps (coaching → warning → PIP)?	<input type="checkbox"/>	<input type="checkbox"/>
Have other employees been held to similar standards?	<input type="checkbox"/>	<input type="checkbox"/>
Is this decision consistent with past company actions?	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee been notified previously when escalation was occurring?	<input type="checkbox"/>	<input type="checkbox"/>

**PROTECTED CLASS / PROTECTED ACTIVITY CHECK**

*High-risk legal trigger. Requires heightened scrutiny.*

Question	Yes	No
Is the employee part of a protected class?	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee recently filed a complaint (harassment, discrimination, retaliation)?	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee requested accommodations or disclosed a medical condition?	<input type="checkbox"/>	<input type="checkbox"/>
Has the employee taken medical, parental, or protected leave recently?	<input type="checkbox"/>	<input type="checkbox"/>
Could the timing of termination create a perception of retaliation?	<input type="checkbox"/>	<input type="checkbox"/>

**If YES to ANY of the above → STOP. HR / Legal review is mandatory before proceeding.**

**INVESTIGATION STATUS**

*If the issue involved misconduct, confirm investigation completeness.*

Question	Yes	No
Was an investigation conducted if the issue involved misconduct?	<input type="checkbox"/>	<input type="checkbox"/>
Are investigation notes, witness statements, and summary complete?	<input type="checkbox"/>	<input type="checkbox"/>
Have findings been objectively supported by evidence?	<input type="checkbox"/>	<input type="checkbox"/>
Was the employee given a chance to respond to allegations?	<input type="checkbox"/>	<input type="checkbox"/>

### PERFORMANCE IMPROVEMENT PLAN (IF APPLICABLE)

*Confirm PIP process was complete and documented.*

Question	Yes	No
Was a PIP used? If so, is it complete?	<input type="checkbox"/>	<input type="checkbox"/>
Did the employee receive coaching and regular check-ins during the PIP?	<input type="checkbox"/>	<input type="checkbox"/>
Were performance goals measurable and achievable?	<input type="checkbox"/>	<input type="checkbox"/>
Is there evidence improvement did not occur despite support?	<input type="checkbox"/>	<input type="checkbox"/>

### RISK & IMPACT ASSESSMENT

*Evaluate the business justification and external perception.*

Question	Yes	No
Does the issue pose risk to clients, safety, confidentiality, or operations?	<input type="checkbox"/>	<input type="checkbox"/>
Is immediate termination required due to a gross policy violation?	<input type="checkbox"/>	<input type="checkbox"/>
Are you prepared to articulate the business reason for termination clearly?	<input type="checkbox"/>	<input type="checkbox"/>
Could a reasonable outsider see this decision as fair and objective?	<input type="checkbox"/>	<input type="checkbox"/>

### LOGISTICS & COMPLIANCE CHECK

*Operational readiness for the termination event.*

Question	Yes	No
Has HR confirmed final pay requirements under applicable state law?	<input type="checkbox"/>	<input type="checkbox"/>
Are all company assets ready for return (laptop, badge, keys, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>
Has IT been notified to remove access on the effective date/time?	<input type="checkbox"/>	<input type="checkbox"/>
Is the termination meeting structured with a witness and documentation?	<input type="checkbox"/>	<input type="checkbox"/>

Are separation notices or benefits continuation information ready (if required)?	<input type="checkbox"/>	<input type="checkbox"/>
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**FINAL DECISION ALIGNMENT**

*Confirm organizational alignment before executing.*

Question	Yes	No
Has HR approved the termination?	<input type="checkbox"/>	<input type="checkbox"/>
Has Legal reviewed the case (if needed)?	<input type="checkbox"/>	<input type="checkbox"/>
Is leadership aligned on the decision and rationale?	<input type="checkbox"/>	<input type="checkbox"/>
Is the manager prepared to deliver the message calmly, factually, and without debate?	<input type="checkbox"/>	<input type="checkbox"/>

**Rule of Thumb**

If the documentation isn't clear, the steps weren't followed, or the timeline creates risk — **the company isn't ready.**

A defensible termination requires five ingredients:

**Consistency · Documentation · Notice · Opportunity to Improve · HR/Legal Approval**

If one of these is missing, you might be opening yourself up to unemployment compensation claims or a lawsuit.

For informational purposes only. Not legal advice. Consult qualified employment counsel before executing any termination action.

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