

# Termination Checklist Template for HR

## Pre-Termination Planning

Tasks to complete before initiating the termination process.

### Proposed Termination Date

### Reason for Termination

- Performance-Based
- Restructuring
- Misconduct
- Redundancy
- Other

### Summary of Performance Concerns (if applicable)

### Number of Performance Improvement Plans (PIPs) issued

### Relevant Policies Violated (if applicable)

- Code of Conduct
- Attendance Policy
- Confidentiality Agreement
- Harassment Policy

### Date of Last Performance Review

Enter date...

## Documentation & Legal Review

Ensuring compliance and minimizing legal risk.

### Termination Date

Enter date...

### Reason for Termination (Detailed)

Write something...

### Termination Type

- Performance-Based
- Redundancy/Restructuring
- Misconduct
- Mutual Agreement

### Performance Improvement Plan (if applicable)

 Upload File

### Summary of Past Performance Discussions

Write something...

### State Labor Law Compliance Check

Reviewed & Compliant

Requires Review

### Final Pay Amount

Enter a number...

## Notification & Meeting Preparation

Preparing for the termination meeting and informing relevant parties.

### Scheduled Meeting Date

Enter date...

### Scheduled Meeting Time

### Meeting Location (In-person/Virtual)

- In-Person
- Virtual

### Attendees (Select all that apply)

- HR Representative
- Employee's Manager
- Legal Counsel (if applicable)

### Meeting Script/Talking Points

Write something...

### Relevant Documentation (e.g., Performance Improvement Plan)

 Upload File

### Employee Notified (Yes/No)

Write something...

### Notes on Employee Notification (if applicable)

Write something...

## Termination Meeting Execution

Steps to take during the termination meeting itself.

### Script for Termination Conversation

Write something...

### Termination Reason Selected (Documented)

- Performance
- Restructuring
- Redundancy
- Misconduct
- Other

### Employee Response/Comments

Write something...

### Effective Termination Date

Enter date...

### Meeting Start Time

### Manager Signature

\_\_\_\_\_

**HR Representative Signature (if present)**

**Notes/Observations during Meeting**

Write something...

## Post-Termination Procedures

Tasks to complete after the termination meeting, including system access, final pay, and benefits.

**Final Paycheck Date**

Enter date...

**Accrued Vacation Time (Hours)**

Enter a number...

**Final Pay Method**

- Direct Deposit
- Paper Check
- Other

**Notes on Final Pay Details (e.g., deductions, tax withholdings)**

Write something...

### Benefits Continuation (COBRA)

- COBRA Notification Sent
- COBRA Information Provided
- N/A

### Last Day of Benefits Coverage

Enter date...

### Copy of COBRA Notification (Optional)

 Upload File

### Return of Company Property

- All Property Returned
- Partial Return – Details Below
- Not Returned – Follow Up Needed

## Communication & Security

Addressing internal and external communications and securing company assets.

### Internal Communication Plan

- Email to Team
- Team Meeting
- Manager Briefing

### Communication Draft for Remaining Team

Write something...

### External Communication (if applicable)

- Client Notification
- Partner Notification
- No External Communication

### External Communication Draft (if applicable)

Write something...

### Asset Retrieval

- Laptop
- Mobile Phone
- Company Vehicle
- Building Access Card
- Other

### Notes on Asset Retrieval

Write something...

### System Access Revocation

- Completed
- In Progress
- Pending

### Date System Access Revoked

Enter date...

## Legal & HR Records

Finalizing paperwork and updating HR records.

### Termination Date

Enter date...

### Summary of Termination Reason (for record-keeping)

Write something...

### Signed Termination Agreement (if applicable)

 Upload File

### Final Paycheck Method

- Direct Deposit
- Paper Check
- Other (Specify)

### Final Paycheck Amount

Enter a number...

### Date Final Paycheck Issued

Enter date...

### Notes Regarding Benefit Continuation (COBRA, etc.)

Write something...

### HR Representative Signature

\_\_\_\_\_