

TERMINATION CHECKLIST

Employee _____

Department _____

Preparation

- The employee's performance problems have been documented in the most recent performance review
- The employee was warned orally
- The worker was warned in writing and given a reasonable opportunity to improve
- Any probationary time period has expired
- The employee's work history has been reviewed and performance reviews support the discharge decisions
- Other workers have been similarly disciplined for the same or similar shortcomings
- The person requested an accommodation (because of a disability)
- If so, possible accommodations were discussed and the interactive process was documented
- If so, a reasonable accommodation was implemented and the employee's work was subsequently evaluated
- A worker other than the manager (e.g., a HR professional or another manager) will/will not be present for the termination
- A time and place have been selected for the meeting that will be as low profile as possible
- If it seems necessary, assistance from security will be readily available should the need for security personnel suddenly arise

- The initial termination remarks have been drafted, including disclosure of the termination decision at the meeting's outset, a statement of any reason(s) for the decision, and consideration of whether the employee will be given the option of resigning
- The reasons that will be given for the termination match the documentation
- The managers that will be present at the meeting have prepared ahead of time for how they will stay on point and keep the meeting professional but brief

Meeting and post-termination steps

- The worker was informed of the termination as planned
- The worker was informed during the termination meeting about the reference policy
- The employee's reaction to the termination was documented after the meeting's conclusion
- The worker cleaned out his or her files within the allotted time and departed the premises
- A plan is in place for how to succinctly announce the news of the worker's separation from employment with other employees without unnecessarily disclosing the reasons
- The payroll change has been prepared and forwarded to the Budget Office

Dept. Representative _____

Date _____