Termination Preparation Checklist

Use this checklist to confirm documentation, compliance, and logistical steps before conducting a termination meeting.

Please provide the relevant employee details below.

Employee Name

First Name   Last Name

Position / Title

Department

Supervisor Name

Termination Date

Month Day   Year

Type of Separation

Confirm that the following documentation steps have been addressed.

Performance or conduct documentation is on file

Yes

No

Not Applicable

Prior coaching or disciplinary steps documented

Yes
No
Not Applicable

Final written warning issued if applicable

Yes
No
Not Applicable

Investigation completed if applicable

Yes
No
Not Applicable

Policy violation clearly identified

Yes
No
Not Applicable

Documentation reviewed for consistency with past cases

Yes
No
Not Applicable

Verify that all legal and compliance steps have been addressed.

Final pay calculation reviewed

Yes
No
Not Applicable

PTO payout requirements confirmed

Yes
No
Not Applicable

Benefits and COBRA notices prepared if applicable

No
Not Applicable

Company property return list prepared

Yes
No
Not Applicable

Access to systems scheduled for deactivation

Yes
No
Not Applicable

Confidentiality or non-compete agreements reviewed

Yes
No
Not Applicable

Assess potential risks associated with the termination.

Any known pending complaints from employee

Yes
No
Not Applicable

Any protected class considerations reviewed

Yes
No
Not Applicable

Any recent leave activity reviewed

Yes
No
Not Applicable

Manager has been briefed on conversation structure

Yes
No
Not Applicable

Prepare for the logistics and communication of the termination meeting.

Who will be present at the meeting

Script or talking points prepared

Yes

No

Not Applicable

Plan for collecting company property

Yes

No

Not Applicable

Plan for communicating departure internally

Yes

No

Not Applicable

Additional Notes (optional)