

Pre-termination checklist

Questions to ask...

- Do you have the records/documentation you need?	Yes	No
- Could this look like a retaliation against this employee?	Yes	No
- Is there a possibility of discrimination for:		
o Sex	Yes	No
o Age	Yes	No
o Race	Yes	No
o Religion	Yes	No
o Worker's Compensation	Yes	No
o Disability	Yes	No
o National Origin	Yes	No
o Marital Status	Yes	No
o Garnishment	Yes	No
o Leave Status	Yes	No
o State-covered protections (sexual orientation, gender identity, etc.)	Yes	No
- Will the employee soon vest in any bonus, retirement benefit or other benefit?	Yes	No
- Has the employee protested any working conditions?	Yes	No
- Has the employee been properly paid?	Yes	No
- Has the employee recently requested leave or presented medical documentation?	Yes	No

Available alternatives...

Naturally, there are many clear-cut cases where termination is the only alternative. There are, however, other possibilities to consider. For example, have you considered...

- Reassignment	Yes	No
- Further Training	Yes	No
- Counseling	Yes	No

Discharge steps...

- Will the employee be surprised?	Yes	No
- Did you meet with the employee as soon as they were failing to perform to standards?	Yes	No
- Were your directions clear, concise, and specific as to what results were expected?	Yes	No
- Was the timeline for improvement communicated?	Yes	No
- Is the current problem truly a recurrence of the ongoing matter?	Yes	No
- It is a new issue requiring a separate discipline?	Yes	No
- Did you investigate?	Yes	No
o Did you find out what really happened?	Yes	No
o Did you give the employee a chance to explain?	Yes	No
o Was the investigation documented?	Yes	No
- Have you noted each incident in which the employee was confronted or disciplined?	Yes	No

- Have disciplinary steps been enforced by any/all of the following methods:

○ Verbal warnings? (documented and dated)	Yes	No
○ Written warnings? (acknowledged by employee or notated "refused to sign" with additional witness signature)	Yes	No
- Have you considered the following factors in determining appropriate next steps:

○ Seriousness of conduct?	Yes	No
○ Employment record?	Yes	No
○ Employee's ability to correct conduct?	Yes	No
○ Action taken with respect to similar conduct by other employees?	Yes	No
○ Effect on customers, guests, clients, vendors?	Yes	No
○ Surrounding Circumstances		
- Complete a separation notice form provided by Resourcing Edge. If in the State of Georgia, complete form DOL-800.
- Ensure all disciplinary documentation (warnings, write-ups, corrective actions, PIP plans, policy infractions, and signed acknowledgments) have been sent to your Client Services contact for accurate record keeping.