COPPERHEAD CONSULTING

COPPERHEAD FIELD GUIDE

Security Assisted Employee Separations

A practical guide for HR and security leaders

THREAT ASSESSMENT / DE-ESCALATION / PROTECTIVE SUPPORT



COPPERHEAD CONSULTING INC

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A GUIDE FOR HR, FACILITIES AND SECURITY

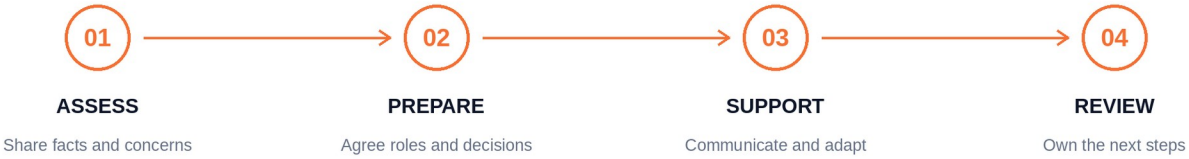
One situation. One shared plan.

Safer employee separations depend on decisions made together

HR has a difficult conversation to lead. Facilities has a building to operate. IT has access to manage. Security has people to protect. Each team can act reasonably and still create an unsafe or confusing response if it is working from a different version of the plan.

An employee-related concern is one problem. Managing a sensitive separation is another. Conflicting internal instructions create a third: uncertainty about who is doing what, what has changed, and when someone needs to act.

That third problem deserves attention before the meeting begins. Coordination is not simply copying more people on an email. It means sharing the relevant facts, agreeing on decisions, confirming readiness, and making sure responsibility transfers when the situation changes.



What this guide helps you do

Use it with the people who own the employment process, workplace, access systems, and protective response. The central question is practical: what must these teams decide together before, during, and after a separation?

Not every separation calls for security in the room or an investigation. The response should fit the documented concern, people exposed, and setting. Respectful treatment of the separating employee remains part of the plan.

The first test of readiness

Ask each participating team to explain the plan in its own words. If their answers differ on timing, authority, access, or escalation, the plan is not yet shared.

The scenarios in this guide are illustrative, not accounts of actual incidents. This is educational guidance, not legal advice or a substitute for a site-specific safety plan. In immediate danger, call 911 and use the site emergency plan.

THE COORDINATION PROBLEM

When departments solve different problems

A completed task can still be the wrong action at the wrong time

Illustrative scenario: the meeting is late; the access change is not

HR delays a separation meeting. IT disables the employee's account at the original time. Facilities leaves the badge active because it is waiting for confirmation that the conversation has ended. Security assumes both access changes are complete.

The employee learns something has changed through a failed login and seeks an explanation elsewhere. That reaction does not establish a threat. The planning failure is that the organization has created an unexpected conversation while its teams disagree about the person's access.

DISCONNECTED ACTION	WHY IT MATTERS	SHARED DECISION NEEDED
Timing changes stay within HR	Other teams continue working to an obsolete sequence.	Who sends the change, who acknowledges it, and what pauses until confirmation?
A request is treated as completion	The team makes decisions on an access change or protective measure that has not happened.	Who verifies the actual result and reports a failure?
Security receives only a label	“Difficult” or “high risk” provides little basis for a proportionate response.	What conduct, source, context, and uncertainty support the concern?
Everyone assumes someone else owns follow-up	New information can arrive without a person responsible for reviewing it.	Who owns the next decision, including after hours?

Fix the connection, not just the individual task

Agree on a coordinated sequence, including what happens if the meeting moves, access cannot be changed, or someone is unavailable. Design the sequence for the facts of the case; there is no single access-shutdown time that fits every separation.

Integration is visible when each team knows what it is waiting for, what it must confirm, and who needs to hear about a change.

ASSESSMENT

Build a shared picture of the concern

Facts are useful. Unexplained labels are not.

Start with what was actually said or done, when it happened, who observed it, and who may be affected. Distinguish a firsthand observation from an allegation, an assessment, and an unanswered question. Preserve relevant messages and records through approved channels.

A statement such as “he is unstable” does not tell the team what decision to make. A dated account of exact words, a named target, an attempted contact, or an access issue gives qualified reviewers something they can examine in context. No single behavior establishes that a person will become violent. [4]

CONDUCT	CONTEXT	ACCESS	SOURCES	GAPS
Exact words and actions	Timing and circumstances	People, places and systems	Reliability and corroboration	Unknowns and conflicting facts

Review these questions together; they are not stages of a person's behavior.

A shared picture supports decisions. It does not predict violence.

When additional investigation is needed

If material facts are unclear or the concern exceeds the team's expertise, involve qualified investigators or threat-assessment professionals. Authorized onsite interviews, incident review, and relevant digital or public-source research may clarify the situation. Verify identity and context; an online account, rumor, or matching name is not confirmation.

Threat assessment is not profiling or a promise to predict violence. Its purpose is to understand concerning conduct and identify ways to reduce risk. Distress, disagreement, job loss, disability, or a protected characteristic alone is not evidence of violent intent. [2, 4]

Share what changes the decision

A shared assessment does not require distributing an entire personnel file. Confirm the purpose, permissions, recipients, and secure handling with the appropriate HR, legal, and privacy leads. Limit information to what each participant needs to act. Do not access private accounts or conduct unauthorized surveillance.

Finish the review with decisions: what needs to change, who owns each action, what remains uncertain, and what new information would require reassessment. An urgent safety concern should not wait for a complete report.

RESPONSIBILITIES

Name the owner of every decision

Shared responsibility works only when individual duties are clear

CISA's insider-threat guidance describes multidisciplinary teams because different functions hold different information and perspectives. For a separation, put that principle into practice by naming decision owners and confirming the handoffs between them. [1]

FUNCTION	WHAT TO OWN AND COORDINATE
HR	Own the employment process and conversation. Coordinate employee communication, pay and benefits questions, accommodations, and the timing of the decision with counsel as appropriate.
Security	Assess protective needs within its expertise. Explain the concern, recommended measures, staffing duties, and conditions that would change or pause the protective plan.
Facilities / site lead	Confirm the physical setting, authorized access arrangements, exits, shared-building coordination, and effects on other occupants or critical services.
IT / access owners	Carry out authorized system and credential changes, preserve relevant records, and confirm results or failures. Coordinate physical and digital access rather than assuming one implies the other.
Legal / privacy	Advise on applicable obligations, investigative limits, information handling, employment issues, and any constraints on the proposed approach.
Leadership / coordinator	Name a plan coordinator and backup. Resolve resource or planning disagreements, record decisions, and confirm that each function has accepted its duties.

Authority must be specific

Agree who can change the meeting, initiate a non-emergency pause, authorize resumption, and arrange additional support. A coordinator keeps the plan connected; that role does not transfer HR's employment authority to security or give private personnel law-enforcement powers.

An outside provider is still part of the same plan

When external security or investigators are involved, give them a named liaison, relevant facts, and defined authority. Require a clear explanation of their recommendations and limitations. A contract or calendar invitation is not an operational briefing.

Anyone facing immediate danger should call 911 and follow the emergency plan without waiting for the coordinator's permission.

EXPOSURE AND MEETING DESIGN

Choose the format around the exposure

The familiar meeting format is not automatically the safest one

Before deciding where to put security personnel, ask whether an in-person meeting is necessary. HR, security, Facilities, and counsel should consider the documented concern, communication needs, accessibility, location, and exposure of other people.

OPTION	WHAT THE TEAM MUST CONSIDER
Remote notification	May reduce immediate physical contact, but does not resolve later site access or contact with colleagues. Agree on communication, access changes, property return, and how new concerns will be reported.
Onsite notification	Confirm the room, participants, privacy, clear exits, nearby occupants, and departure arrangements. Do not create a crowd or make the employee feel physically trapped.
Change timing or format	If necessary people, information, or safeguards are missing, assess whether to postpone the planned event or use another method. HR and counsel address employment implications; security addresses protective concerns.

Coordinate access; do not assume a lockdown is the answer

Agree which physical and digital permissions change, who authorizes each change, and how completion is verified. Match timing to the assessed concern and approved employment process. A failed credential change needs a response, not an assumption that the system worked.

Any restriction on entry must be coordinated with site emergency procedures and safe egress. In a hospital, shared office, school, or multi-tenant building, the separation plan must also account for patients, visitors, other tenants, and essential operations.

Plan the ordinary questions, too

Explain how the employee can ask about benefits, collect personal belongings, return property, or receive follow-up information. Unanswered practical questions can produce avoidable contacts after the meeting. Provide a clear, respectful route for those contacts.

The objective is to reduce unnecessary exposure while preserving dignity—not to make every separation look like a security incident.

PREPARATION

Prepare people, not just procedures

People need to recognize their role before the situation changes

A written plan is only useful if the people involved can carry it out. Brief HR, supervisors, reception, Facilities, and security on the actions relevant to their roles. Use qualified training where skills are missing; a last-minute briefing does not replace practice.

Teach what to notice, what to say, and when to get help

- Reporting: describe observable words and actions, the time and location, and any immediate safety concern. Avoid diagnoses or assumptions about intent.
- Communication: use calm, direct language and measured tone. Avoid arguing, crowding, threatening gestures, or promises outside your authority.
- Personal safety: maintain respectful space, know the way to safety, and avoid blocking exits. Basic positioning and defensive awareness are not instructions to restrain someone.
- Limits: know when to pause, disengage, request trained help, or activate emergency procedures. Staff should not be expected to physically intervene because they attended a class.

CISA's de-escalation guidance treats recognition, communication, safety, and obtaining help as connected activities. De-escalation is an option when it is safe—not a requirement to remain in danger. [3]

Rehearse a change, not just the ideal sequence

Walk through one disruption: the room changes, an essential person is absent, the employee arrives early, or a new message raises concern. Ask each team what it would do and who it would notify. A rehearsal should expose mismatched assumptions before a real person is affected.

Confirm an agreed communication method and a backup. A message that was sent but not acknowledged is not proof that the receiving person is ready.

Keep the briefing relevant

Reception may need an access instruction and escalation contact, not the employee's disciplinary history. Protective personnel may need detailed safety information that should not be circulated more widely. Tailor the briefing without withholding facts essential to someone's safety.

READINESS AND ESCALATION

Agree on escalation before the event

Different concerns need different actions—not a single ladder everyone must climb

The planning sequence and emergency response operate in parallel. Agree on case-specific examples of when to pause, involve police, or call 911. Do not require a completed investigation or internal approval before seeking emergency help. [5]



Example triggers. Use case-specific criteria. Emergencies bypass earlier steps.

These are example triggers, not a scoring system or an exhaustive list. Reporting a threat does not require the organization to prove it first. If danger is immediate, call 911 and use the site emergency plan; do not wait for security to arrive. [5]

DECISION-MAKING UNDER UNCERTAINTY

Resolve disagreement before proceeding

A risk label is not a decision, and silence is not agreement

Illustrative scenario: “we thought you knew”

HR expects an emotional but routine conversation. Security has heard an allegation of a threat. Facilities has received a request for extra coverage without an explanation. Each team assumes someone else has reviewed the whole picture and authorized the meeting.

The first task is not to decide whose label wins. It is to identify whether the teams have different facts, different interpretations of the same facts, or different assumptions about what will happen.

IF THE DISAGREEMENT IS ABOUT…	RESOLVE IT BY…
The facts	Identifying the source, timing, exact conduct, corroboration, and what remains unknown. Preserve urgency; verification must not delay emergency action.
The proposed safeguard	Naming the exposure it addresses, its limits, and a workable alternative. “Add security” is not enough without explaining the duties.
Authority or resources	Bringing the decision to the named owner. Separate the employment decision from whether the proposed protective arrangement is ready.
Whether to resume	Recording what must be confirmed, by whom, and what changed. Do not restart simply because the scheduled time has arrived.

Give the team permission to stop a routine process

Before the event, agree who can initiate a non-emergency pause and how any participant can raise a material safety concern. Name who evaluates the concern and authorizes resumption. A planned pause should lead to an answer, an adjustment, or a different approach—not an argument in front of the employee.

Do not compromise by averaging “low” and “high” into “medium.” Resolve the underlying facts and decisions. If immediate danger develops, use emergency procedures without waiting for consensus.

The team does not need identical professional opinions. It needs a common understanding of the evidence, the chosen action, and the limits of that action.

SITE READINESS AND STAFFING

Staff the duties, not just the room

Headcount is not the same as coverage

Start with the duties that may need to happen at the same time: supporting a conversation, protecting someone exposed, communicating with the site team, managing an entrance, or supporting a departure. Assign people only after those duties are understood.

For a higher-concern event requiring physical protective support, ask how duties will be divided within a team. Two personnel may allow one to remain with a person needing protection while the other handles an agreed support duty. That is a staffing example, not a universal ratio or proof of adequate coverage. Add people or change the activity when required duties compete.

PLANNING QUESTION	WHAT A USEFUL ANSWER IDENTIFIES
Who stays with people who need protection?	A qualified person assigned to that duty, with no conflicting task that would pull them away.
Who covers access and other occupants?	Required locations, the person responsible, and what happens if that person must move.
Who communicates and requests help?	The lead, communication method, backup, and emergency reporting arrangements.
What happens if coverage changes?	Relief, a revised activity, or a pause. Do not quietly accept an uncovered required duty.

Fit the plan to the building

A room-level plan may miss a shared lobby, another floor, a loading area, or a clinical service that must remain staffed. Include the site or ward leader who understands normal operations, accessibility needs, and the effect of changing access.

OSHA's guidance combines worksite assessment, physical and administrative controls, and training. Protective staffing is one possible measure, not a complete prevention program. [6]

Confirm readiness before notification

Check that the agreed personnel are available, duties are understood, access arrangements work, and communication is acknowledged. If an essential condition is missing, revisit the plan before beginning a routine event.

DURING THE CONVERSATION

De-escalate without competing instructions

The employee should not have to work out who is in charge

Illustrative scenario: three people, three directions

The employee becomes upset. HR begins explaining benefits. A manager demands the laptop. A security officer enters and says it is time to leave. None of them intends to escalate the situation, but their instructions compete.

Distress alone is not a threat. The coordination problem is the absence of an agreed speaker, intervention role, and transition between the employment conversation and any protective action.

Agree on the communication roles

- Name the HR lead for the employment message and practical questions. Avoid multiple people interrupting or adding new demands.
- Explain the role of any support personnel appropriately. A low-profile presence can remain attentive without taking over the discussion.
- Agree when and how security will offer support, request a pause, or end routine activity for safety. Do not wait for a discreet cue when immediate danger requires action.
- If a transition is needed, give one clear next step within the speaker's authority. Do not manufacture a cover story or make promises to obtain compliance.

Make the setting support the message

Maintain respectful distance and a calm demeanor. Avoid crowding, blocking exits, or using a show of force as a substitute for communication. Allow space for a response when safe; a pause is not automatically a loss of control. [3]

Observe behavior in context. A gesture, change in posture, disability-related behavior, or refusal to answer does not by itself reveal violent intent. Communicate the specific conduct that changes the safety assessment, not a guess about what someone is thinking.

Know when conversation is no longer the task

If the situation becomes unsafe, stop the routine process, seek safety, and obtain the appropriate help. De-escalation does not require HR to negotiate through active violence, physically remove someone, or delay an emergency call.

DEPARTURES AND PROTECTIVE MOVEMENT

Protect departures without creating gaps

Moving one person to safety can change everyone else's coverage

Illustrative scenario: the escort uses the whole team

Two protective personnel accompany an executive to a vehicle. At the same time, the plan still requires a person at a separate entrance. No one has accepted that assignment. The executive's departure has been supported, but the entrance duty is uncovered.

If two personnel must remain with the executive and one must cover the entrance simultaneously, those are three assignments. Two people cannot cover all three. Arrange additional coverage or change the planned activity; do not rely on the same person being in two places.

Decide the handoff before anyone moves

- Identify who may need protective support and what skills that task requires. The need can involve an HR representative, witness, employee, or executive—not only the most senior person.
- Confirm who remains responsible for the meeting area, other occupants, and any required access duties during a planned departure.
- Have the receiving person acknowledge a transfer of responsibility. “Someone is watching the door” is not a handoff.
- Agree what happens if the route, destination, transportation, or coverage becomes unavailable. Immediate emergency action must not wait for the planned staffing arrangement.

Recognize the link to executive protection

A workplace concern can extend beyond a meeting room into movement between locations. The relevant protection skills are advance planning, discretion, communication, coordinated movement, and continuity of coverage. Ask whether assigned personnel can perform those duties, rather than assuming any security assignment provides the same skills.

Plan the separating employee's departure with dignity

Explain property-return and personal-belongings arrangements. Do not create an improvised confrontation over equipment or force an encounter simply to complete an administrative task. Use an approved alternative when necessary, with legal or policy questions referred to the proper owner.

A departure is a change in the plan, not the point at which the team stops communicating.

FOLLOW-THROUGH

Keep ownership after the meeting

Keep a clear reporting route after the meeting

The organization still needs to know who receives new information, who reviews it, and who can change protective measures. That may be a brief handoff for a routine separation or a more structured follow-up for a documented concern. Match the work to the facts.

AFTER THE MEETING	WHAT THE TEAM SHOULD CONFIRM
Access and property	Authorized changes actually occurred; exceptions have owners; property or personal-belongings arrangements are clear.
Further communication	The employee has an appropriate route for administrative questions. Staff know where to report concerning contact without starting parallel conversations.
New information	A named person and backup receive reports, assess urgency, and reconnect HR, security, Facilities, IT, or other specialists as needed.
Coverage and review	Continuing measures have a purpose, owner, and review point. Changes are based on reassessment, not an automatic elapsed-time assumption.

Preserve the facts; do not build a rumor network

Record relevant words, actions, dates, sources, decisions, and handoffs. Preserve messages or other evidence through approved channels and consult the appropriate records owner about retention. Limit distribution to authorized people with a need to know. Threat-related evidence may matter to responding authorities. [5]

Learn from the coordination

Debrief what changed, where the teams had different information, and which instructions were unclear. Ask whether an action was confirmed or merely assumed. Identify the owner of each process improvement.

A quiet outcome does not prove that every safeguard worked. Equally, distress does not prove that the employee was dangerous. Review the quality of decisions and coordination without rewriting the facts to fit the outcome.

Use follow-up to maintain accountability and proportionate support—not to label someone indefinitely or continue unnecessary monitoring.

PUT THE GUIDANCE TO WORK

Test the plan before you need it

The most useful exercise reveals a missing connection

Bring together the people who would actually act: HR, site leadership, Facilities, security, IT or access control, and counsel where appropriate. Use a fictional scenario or a suitably sanitized example. Ask participants to answer separately first, then compare their answers.

ASK THE TEAM	LISTEN FOR A CONCRETE ANSWER
What do we know—and what are we assuming?	Observable facts, source and timing, unresolved questions, and the person responsible for clarification.
What happens if the time or location changes?	One change owner, affected teams, acknowledgments, and what stops until readiness is reconfirmed.
Who can pause, and who can restart?	Named authority to initiate a non-emergency pause and authorize resumption, plus a way for anyone to raise a concern. Emergency action remains available to anyone.
What would trigger police or emergency help?	Case-specific examples, the appropriate reporting channel, and no requirement to wait for internal approval in immediate danger.
Who retains each responsibility after a departure?	Coverage that survives departures, acknowledged handoffs, a follow-up owner, and a backup.

Make the exercise produce a change

If two teams give different answers, do not dismiss the difference as a communication issue. Identify the specific decision, handoff, or authority that is missing. Assign an owner to resolve it and confirm that the revised approach is understood.

If the organization uses outside specialists, include them in the relevant planning and rehearsal. Their expertise is useful only when it connects with the people who know the employee process, workplace, and daily operations.

The next step

Before the next sensitive separation, ask one question together: “What do you expect my team to do if the plan changes?”

The answer should be specific enough to act on—and consistent enough that the employee, people at risk, and other occupants are not caught between competing plans. Safer separations begin when the organization can give that answer together.

SOURCES AND FURTHER READING

Sources and further reading

Public guidance behind the principles—not a substitute for local judgment

The sources below support multidisciplinary assessment, prevention, de-escalation, and reporting. The scenarios, role assignments, staffing examples, and planning exercises in this guide are practical applications offered for consideration; they are not quoted agency requirements.

[1] CISA — Insider Threat Mitigation Guide

Multidisciplinary threat-management teams and coordination across organizational functions.

[2] U.S. Secret Service, NTAC — Behavioral Threat Assessment Units (2024)

Contextual assessment, corroboration, and prevention. Written for law enforcement; its assessment principles do not grant employers or private security police powers.

[3] CISA — De-escalation Action Guide (December 2024)

Recognizing concerns, communicating safely, de-escalation options, and obtaining help.

[4] FBI — Prevent Mass Violence

Early reporting and the importance of considering behavior in context rather than treating a single behavior as proof of future violence.

[5] FBI — Threat Intimidation Guide

Threat reporting, preserving relevant information, and calling 911 for immediate physical danger.

[6] OSHA — Workplace Violence Overview

Worksite assessment, prevention programs, physical and administrative controls, and training.

Scope of this guide

Adapt these educational recommendations to the organization, site, applicable law, employee rights, and qualified professional advice. No checklist, staffing number, training course, or assessment guarantees safety. This guide does not authorize searches, surveillance, detention, physical removal, or use of force.

For immediate danger in the United States, call 911 and follow the site emergency plan. Do not delay to seek organizational approval.

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