Employee Exit Checklist

Free Employee Exit Checklist with AI customization. Industry-specific guidance for employee exit checklist. Build your checklist now.

Initial Exit Process

- ☐ Receive resignation/termination notice
- ☐ Document resignation date and reason
- ☐ Acknowledge receipt of resignation
- ☐ Determine last working day
- ☐ Calculate final pay and benefits
- ☐ Review employment agreement terms
- ☐ Check non-compete/non-disclosure agreements
- ☐ Schedule exit interview
- ☐ Notify HR and payroll
- ☐ Inform IT of departure date
- ☐ Update organizational records
- ☐ Begin transition planning

Knowledge Transfer

- ☐ Create list of current projects
- ☐ Document work in progress
- ☐ Identify critical tasks and deadlines
- ☐ Transfer project ownership
- ☐ Share important passwords (secure method)
- ☐ Document key processes
- ☐ Update procedure manuals
- ☐ Transfer client/vendor relationships
- ☐ Provide status reports
- ☐ Train replacement or team members
- ☐ Create handover documentation
- ☐ Archive important emails

IT & Security Deprovisioning

- ☐ Disable email account (set out-of-office first)
- ☐ Remove system access
- ☐ Revoke VPN access
- ☐ Disable building access cards
- ☐ Change shared passwords
- ☐ Remove from distribution lists
- ☐ Transfer file ownership
- ☐ Backup important data

- [ ] Remove from collaboration tools
- [ ] Revoke software licenses
- [ ] Clear browser saved passwords
- [ ] Wipe company devices

Return of Company Property

- [ ] Collect laptop/computer
- [ ] Return mobile phone
- [ ] Retrieve tablet/other devices
- [ ] Collect access cards/keys
- [ ] Return parking pass
- [ ] Retrieve company credit cards
- [ ] Collect uniforms (if applicable)
- [ ] Return equipment (headset, mouse, etc.)
- [ ] Retrieve company documents
- [ ] Return training materials
- [ ] Collect any borrowed items
- [ ] Get signed property return form

Financial & Benefits Settlement

- [ ] Calculate final paycheck
- [ ] Process unused vacation/PTO payout
- [ ] Determine benefits end date
- [ ] Explain COBRA options
- [ ] Process final expense reports
- [ ] Recover any outstanding advances
- [ ] Calculate severance (if applicable)
- [ ] Provide 401(k) rollover information
- [ ] Update life insurance beneficiaries
- [ ] Cancel corporate cards
- [ ] Settle any outstanding debts
- [ ] Provide final pay stub

Documentation & Compliance

- [ ] Complete separation paperwork
- [ ] File final timesheet
- [ ] Update personnel file
- [ ] Document separation reason
- [ ] Prepare service letter (if required)
- [ ] Issue ROE (Record of Employment)
- [ ] Complete unemployment documentation
- [ ] Archive performance reviews
- [ ] Secure confidential information
- [ ] Update compliance records
- [ ] File termination report

- [ ] Maintain records per retention policy

Exit Interview & Feedback

- [ ] Schedule exit interview
- [ ] Prepare interview questions
- [ ] Discuss reasons for leaving
- [ ] Gather feedback on management
- [ ] Review company culture feedback
- [ ] Identify improvement areas
- [ ] Document suggestions
- [ ] Thank employee for service
- [ ] Maintain professional relationship
- [ ] Get forwarding contact information
- [ ] Discuss reference policy
- [ ] Complete exit interview form

Final Day Procedures

- [ ] Conduct final meeting with manager
- [ ] Say goodbye to team
- [ ] Clean out desk/workspace
- [ ] Remove personal items
- [ ] Return office to original state
- [ ] Complete final tasks
- [ ] Submit final reports
- [ ] Sign exit documents
- [ ] Receive final paycheck (if ready)
- [ ] Get copies of signed documents
- [ ] Escort from building (if required)
- [ ] Wish well in future endeavors