



Employee Offboarding Checklist

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Immediate Actions Upon Notice

- ☐ Document resignation/termination details
- ☐ Confirm last day of work
- ☐ Notify HR department immediately
- ☐ Inform direct manager and team
- ☐ Begin succession planning
- ☐ Review contractual obligations
- ☐ Check notice period requirements
- ☐ Plan coverage for responsibilities
- ☐ Schedule transition meetings
- ☐ Update project timelines
- ☐ Communicate with stakeholders
- ☐ Begin recruitment process if replacing

Transition Planning

- ☐ Map out all current responsibilities
- ☐ Identify critical ongoing projects
- ☐ Create detailed transition plan
- ☐ Assign temporary coverage
- ☐ Document all processes and procedures
- ☐ Transfer knowledge to team members
- ☐ Update client/vendor contacts
- ☐ Reassign direct reports (if applicable)
- ☐ Move recurring meetings
- ☐ Transfer budget responsibilities
- ☐ Document decision-making authority
- ☐ Create continuity plan

Administrative Tasks

- ☐ Process resignation in HRIS
- ☐ Calculate final compensation
- ☐ Stop future pay periods
- ☐ Process benefit terminations
- ☐ Submit paperwork to payroll
- ☐ Update organizational charts
- ☐ Remove from employee directory
- ☐ Cancel scheduled reviews

- ☐ Update succession plans
- ☐ Notify facilities management
- ☐ Cancel training registrations
- ☐ Update emergency contact lists

Access & Security Management

- ☐ Create IT offboarding ticket
- ☐ Set email auto-responder
- ☐ Schedule email deactivation
- ☐ Forward emails to manager
- ☐ Revoke network access
- ☐ Disable remote access
- ☐ Remove from security groups
- ☐ Change locks if necessary
- ☐ Update alarm codes
- ☐ Remove from authorized lists
- ☐ Revoke parking access
- ☐ Update visitor management system

Asset Recovery

- ☐ Create inventory of company property
- ☐ Schedule equipment return
- ☐ Collect electronic devices
- ☐ Retrieve security badges
- ☐ Return office keys
- ☐ Collect company documents
- ☐ Retrieve software/licenses
- ☐ Return library materials
- ☐ Collect tools/equipment
- ☐ Get expense receipts
- ☐ Clear personal belongings
- ☐ Document returned items

Financial Reconciliation

- ☐ Review final expenses
- ☐ Process outstanding reimbursements
- ☐ Calculate PTO payout
- ☐ Determine severance eligibility
- ☐ Close purchase accounts
- ☐ Cancel subscriptions
- ☐ Transfer budget authority
- ☐ Audit expense reports
- ☐ Collect outstanding debts
- ☐ Process final commissions
- ☐ Update financial records

- ☐ Remove signature authority

Knowledge Documentation

- ☐ Document current project status
- ☐ Create process documentation
- ☐ Record system passwords
- ☐ List key contacts
- ☐ Document recurring tasks
- ☐ Note important dates/deadlines
- ☐ Record vendor information
- ☐ Document customer preferences
- ☐ Create troubleshooting guides
- ☐ Note lessons learned
- ☐ Archive project files
- ☐ Transfer intellectual property

Team Communication

- ☐ Announce departure to team
- ☐ Explain transition plan
- ☐ Introduce interim coverage
- ☐ Address team concerns
- ☐ Maintain morale
- ☐ Celebrate contributions
- ☐ Plan farewell gathering
- ☐ Collect team feedback
- ☐ Share contact information
- ☐ Express gratitude
- ☐ Maintain professionalism
- ☐ Support team through change

Client/Vendor Management

- ☐ Notify key clients
- ☐ Introduce new contacts
- ☐ Transfer relationships smoothly
- ☐ Update vendor contacts
- ☐ Reassign account management
- ☐ Communicate continuity plan
- ☐ Address concerns promptly
- ☐ Maintain service quality
- ☐ Document special requirements
- ☐ Transfer historical knowledge
- ☐ Ensure seamless transition
- ☐ Follow up post-transition

Exit Procedures

- ☐ Conduct exit interview
- ☐ Document feedback received
- ☐ Process final paperwork
- ☐ Verify all items returned
- ☐ Complete separation agreement
- ☐ Provide reference letter (if applicable)
- ☐ Explain post-employment obligations
- ☐ Share alumni network info
- ☐ Maintain positive relationship
- ☐ Document lessons learned
- ☐ Update procedures based on feedback
- ☐ Archive employee records

Benefits Administration

- ☐ Explain benefit termination dates
- ☐ Process COBRA enrollment
- ☐ Transfer life insurance
- ☐ Handle 401(k) options
- ☐ Address FSA/HSA accounts
- ☐ Cancel parking/transit benefits
- ☐ End wellness programs
- ☐ Stop employee discounts
- ☐ Provide benefits summary
- ☐ Answer benefits questions
- ☐ Document elections made
- ☐ Confirm understanding

Post-Offboarding Activities

- ☐ Monitor email forwards
- ☐ Address lingering issues
- ☐ Process reference requests
- ☐ Handle unemployment claims
- ☐ Track non-compete compliance
- ☐ Manage alumni relations
- ☐ Conduct team retrospective
- ☐ Implement process improvements
- ☐ Update documentation
- ☐ Share best practices
- ☐ Measure offboarding effectiveness
- ☐ Plan for future needs

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