



Offboarding Checklist Template

Free Offboarding Checklist Template with AI customization. Industry-specific guidance for offboarding checklist template. Build your checklist now.

Employee Information

- ☐ Employee Name: _____
- ☐ Employee ID: _____
- ☐ Position: _____
- ☐ Department: _____
- ☐ Manager: _____
- ☐ Last Day: _____
- ☐ Departure Type: %i Voluntary %i Involuntary
- ☐ Reason: _____
- ☐ Notice Given: _____
- ☐ Exit Interview: %i Scheduled %i Completed

Pre-Departure Tasks (Complete by: _____)

- ☐ Resignation received %i Date: _____
- ☐ HR notified %i Date: _____
- ☐ IT notified %i Date: _____
- ☐ Transition plan created %i Date: _____
- ☐ Replacement planning started %i Date: _____
- ☐ Knowledge transfer scheduled %i Date: _____
- ☐ Exit interview scheduled %i Date: _____
- ☐ Final pay calculated %i Amount: _____

Week Before Departure

- ☐ Knowledge transfer sessions %i Completed: _____
- ☐ Project handover %i Completed: _____
- ☐ Documentation updated %i Completed: _____
- ☐ Client transitions %i Completed: _____
- ☐ Team notifications %i Sent: _____
- ☐ Access audit conducted %i Date: _____
- ☐ Property return scheduled %i Date: _____
- ☐ Benefits review meeting %i Date: _____

IT & Systems Deprovisioning

- ☐ Email account %i Deactivated: _____
- ☐ Network access %i Removed: _____
- ☐ VPN access %i Revoked: _____
- ☐ Software licenses %i Transferred: _____

- ☐ Cloud accounts %j Disabled: _____
- ☐ Database access %j Removed: _____
- ☐ Shared drives %j Access removed: _____
- ☐ Collaboration tools %j Removed: _____
- ☐ Phone system %j Updated: _____
- ☐ Website/directory %j Updated: _____

Physical Access & Security

- ☐ Building access card %j Returned: _____
- ☐ Office keys %j Returned: _____
- ☐ Parking pass %j Returned: _____
- ☐ Desk/office %j Cleared: _____
- ☐ Alarm codes %j Changed: _____
- ☐ Safe combinations %j Changed: _____
- ☐ Locker %j Cleared: _____
- ☐ ID badge %j Returned: _____

Company Property Return

- ☐ Laptop/Computer %j Returned: _____ Serial #: _____
- ☐ Mobile phone %j Returned: _____ Number: _____
- ☐ Tablet/iPad %j Returned: _____ Serial #: _____
- ☐ Monitor(s) %j Returned: _____ Count: _____
- ☐ Headset %j Returned: _____
- ☐ Company credit card %j Returned: _____ Last 4: _____
- ☐ Uniforms %j Returned: _____ Count: _____
- ☐ Tools/Equipment %j Returned: _____ List: _____
- ☐ Company vehicle %j Returned: _____ VIN: _____
- ☐ Other: _____ %j Returned: _____

Financial & Payroll

- ☐ Final paycheck %j Amount: _____ %j Date: _____
- ☐ PTO payout %j Hours: _____ %j Amount: _____
- ☐ Expense reports %j Submitted: _____ %j Paid: _____
- ☐ Advances recovered %j Amount: _____
- ☐ Commissions calculated %j Amount: _____
- ☐ Severance %j Amount: _____ %j Terms: _____
- ☐ COBRA paperwork %j Provided: _____
- ☐ 401(k) information %j Provided: _____

Documentation

- ☐ Separation agreement %j Signed: _____
- ☐ NDA reminder %j Acknowledged: _____
- ☐ Non-compete reminder %j Acknowledged: _____
- ☐ Reference policy %j Explained: _____
- ☐ Employment verification %j Completed: _____

- ☐ Service letter %i Provided: _____
- ☐ Exit interview notes %i Filed: _____
- ☐ Final timesheet %i Submitted: _____

Benefits Termination

- ☐ Health insurance %i End date: _____
- ☐ Dental/Vision %i End date: _____
- ☐ Life insurance %i End date: _____
- ☐ Disability %i End date: _____
- ☐ FSA/HSA %i Instructions given: _____
- ☐ Other benefits %i Terminated: _____
- ☐ COBRA notice %i Sent: _____
- ☐ Benefits summary %i Provided: _____

Communication

- ☐ Team notified %i Date: _____
- ☐ Clients notified %i Date: _____
- ☐ Vendors notified %i Date: _____
- ☐ Internal announcement %i Sent: _____
- ☐ External announcement %i If applicable: _____
- ☐ LinkedIn updated %i Date: _____
- ☐ Email auto-reply set %i Message: _____
- ☐ Phone forwarding set %i To: _____

Knowledge Transfer Verification

- ☐ Projects documented: _____
- ☐ Processes documented: _____
- ☐ Passwords transferred: _____
- ☐ Contacts shared: _____
- ☐ Files organized: _____
- ☐ Training completed: _____
- ☐ Questions answered: _____

Exit Interview Summary

- ☐ Overall experience: %i Positive %i Neutral %i Negative
- ☐ Reason for leaving: _____
- ☐ Recommendations: _____
- ☐ Would rehire: %i Yes %i No %i Maybe
- ☐ Notes: _____

Final Sign-offs

- ☐ Employee signature: _____ Date: _____
- ☐ Manager signature: _____ Date: _____
- ☐ HR signature: _____ Date: _____

☐ IT signature: _____ Date: _____

Post-Departure Follow-up

- ☐ 30-day check %j Date: _____ %j Issues: _____
- ☐ References provided %j Count: _____
- ☐ Alumni network added %j Date: _____
- ☐ Rehire eligibility: %j Yes %j No
- ☐ File archived %j Date: _____
- ☐ Lessons learned documented %j Date: _____

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