Offboarding Checklist

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Initial Offboarding Process

- [ ] Receive resignation/termination notice
- [ ] Document departure date and reason
- [ ] Acknowledge resignation formally
- [ ] Calculate final working day
- [ ] Notify HR immediately
- [ ] Inform IT of departure date
- [ ] Alert security team
- [ ] Update organizational records
- [ ] Begin transition planning
- [ ] Schedule exit interview
- [ ] Prepare separation documents
- [ ] Coordinate with payroll

Knowledge Transfer

- [ ] Create list of current projects
- [ ] Document work in progress
- [ ] Identify critical tasks and deadlines
- [ ] Transfer project ownership
- [ ] Share important passwords securely
- [ ] Document key processes
- [ ] Update procedure manuals
- [ ] Transfer client relationships
- [ ] Provide status reports
- [ ] Train replacement or team members
- [ ] Create comprehensive handover notes
- [ ] Archive important communications

Access Revocation

- [ ] Disable email account (after setting OOO)
- [ ] Remove system access
- [ ] Revoke VPN credentials
- [ ] 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 saved passwords
- [ ] Wipe company devices

Return of Company Property

- [ ] Collect laptop/computer equipment
- [ ] Retrieve mobile phone
- [ ] Return tablets/other devices
- [ ] Collect access cards and keys
- [ ] Return parking pass
- [ ] Retrieve company credit cards
- [ ] Collect uniforms/branded items
- [ ] Return office equipment
- [ ] Retrieve company documents
- [ ] Return training materials
- [ ] Collect any borrowed items
- [ ] Document all returns

Financial Settlement

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

Documentation & Compliance

- [ ] Complete separation paperwork
- [ ] File final timesheet
- [ ] Update personnel records
- [ ] Document separation reason
- [ ] Prepare service letter
- [ ] Issue employment verification
- [ ] Complete unemployment forms
- [ ] Archive performance reviews
- [ ] Secure confidential information
- [ ] Update compliance records
- [ ] File termination report

- [ ] Maintain records per policy

Exit Interview

- [ ] Schedule exit interview
- [ ] Prepare interview questions
- [ ] Discuss departure reasons
- [ ] Gather feedback on experience
- [ ] Review company culture insights
- [ ] Identify improvement areas
- [ ] Document suggestions
- [ ] Thank for contributions
- [ ] Maintain professional tone
- [ ] Get forwarding information
- [ ] Discuss reference policy
- [ ] Complete interview form

Communication Management

- [ ] Notify immediate team
- [ ] Inform key stakeholders
- [ ] Update clients/customers
- [ ] Notify vendors/partners
- [ ] Draft internal announcement
- [ ] Prepare external communication
- [ ] Update organizational chart
- [ ] Remove from website/directory
- [ ] Change email signatures
- [ ] Redirect phone calls
- [ ] Update project assignments
- [ ] Manage transition messaging

IT & Security Deprovisioning

- [ ] Create IT offboarding ticket
- [ ] Backup user data
- [ ] Archive email account
- [ ] Transfer software licenses
- [ ] Remove from AD/LDAP
- [ ] Disable SSO access
- [ ] Revoke API keys
- [ ] Remove from databases
- [ ] Clear cache/temp files
- [ ] Document digital assets
- [ ] Ensure data security
- [ ] Complete audit trail

Benefits & Payroll

- [ ] Process final payroll
- [ ] Stop future payments
- [ ] Calculate benefit costs
- [ ] Process COBRA paperwork
- [ ] End insurance coverage
- [ ] Stop retirement contributions
- [ ] Cancel other benefits
- [ ] Provide benefits summary
- [ ] Explain continuation options
- [ ] Process final deductions
- [ ] Update tax records
- [ ] Close payroll account

Legal & Regulatory

- [ ] Review employment agreement
- [ ] Enforce non-compete clauses
- [ ] Confirm NDA obligations
- [ ] Document IP assignments
- [ ] Process unemployment claims
- [ ] Comply with state laws
- [ ] Meet notice requirements
- [ ] Provide required documents
- [ ] Maintain confidentiality
- [ ] Protect company interests
- [ ] Avoid discrimination claims
- [ ] Document everything

Final Day Procedures

- [ ] Conduct final meeting
- [ ] Collect remaining items
- [ ] Clear personal workspace
- [ ] Complete final tasks
- [ ] Submit final reports
- [ ] Sign exit documents
- [ ] Receive final pay (if ready)
- [ ] Get document copies
- [ ] Say goodbyes appropriately
- [ ] Escort from premises (if required)
- [ ] Wish well professionally
- [ ] Close out gracefully

Post-Departure Tasks

- ☐ Send COBRA notices
- ☐ Process reference requests
- ☐ Monitor email forwards
- ☐ Handle unemployment claims
- ☐ Track non-compete compliance
- ☐ Manage IP concerns
- ☐ Update team structure
- ☐ Redistribute workload
- ☐ Begin recruitment (if replacing)
- ☐ Conduct team debrief
- ☐ Implement improvements
- ☐ Close employee file