Employee Offboarding Checklist

Employee name: [Employee Name] Job title: [Job Title] Department / site: [Department] Manager: [Manager Name] Separation type: [Voluntary resignation / Involuntary / Layoff / Retirement / End of contract] Notice received: [Date] Last day worked: [Date] Offboarding owner (HR): [Name]. Tick each item and note the date and initials of the person who completed it. Items marked (Involuntary) apply only when the employer ends employment.

AS SOON AS THE SEPARATION IS CONFIRMED

- [ ] HR: Receive written resignation or confirm termination decision and record the separation type and reason code in the HRIS
- [ ] HR: Confirm last day worked and separation date in writing to the employee (resignation acceptance or termination letter)
- [ ] HR: Check for open leave, accommodation, workers' compensation or complaint matters and flag to counsel if any are open
- [ ] HR: Check signed agreements on file (confidentiality, non-solicitation, non-compete, invention assignment, training repayment, arbitration)
- [ ] HR: Check state final pay deadline and PTO payout rules for the employee's work location
- [ ] Manager: Tell the team and key internal contacts, with the employee's agreement on wording for voluntary leavers
- [ ] Manager: Decide whether to backfill and open a requisition if approved
- [ ] (Involuntary) HR and IT: Agree the exact time system access will be removed, timed to the termination meeting

KNOWLEDGE TRANSFER AND HANDOVER (NOTICE PERIOD)

- [ ] Manager: List the employee's open work, recurring tasks, deadlines and owners for each after they leave
- [ ] Employee: Write handover notes for each responsibility, including where files live, key contacts and passwords stored in the shared vault
- [ ] Employee: Transfer ownership of shared documents, drives, dashboards and recurring meetings to the named successor
- [ ] Employee and manager: Introduce successor to clients, vendors or candidates the employee owned
- [ ] Manager: Reassign open tickets, cases, requisitions or accounts in each system
- [ ] Employee: Set out-of-office message and voicemail with successor's contact details for the last day
- [ ] Manager: Confirm handover is complete and sign off

COMPANY PROPERTY

- [ ] Collect laptop, monitors, docking station and chargers
- [ ] Collect mobile phone and SIM, or arrange number transfer if the employee keeps a personal number
- [ ] Collect ID badge, building keys, access cards, parking pass
- [ ] Collect corporate credit card and fuel cards; cancel cards with finance

- [ ] Collect tools, uniforms, safety equipment, vehicles and vehicle keys
- [ ] Collect paper files and any company data on personal devices or storage
- [ ] Remote employee: send prepaid return kit with item list and a return deadline
- [ ] Record all items returned and any missing on the company property return form, signed by both parties

SYSTEMS AND ACCESS

- [ ] IT: Disable network, email and single sign-on access at the agreed date and time
- [ ] IT: Remove access to business applications not covered by single sign-on (HRIS, CRM, ATS, payroll, finance, telephony, cloud storage)
- [ ] IT: Remove VPN, remote access tokens and multi-factor authentication devices
- [ ] IT: Revoke building access and alarm codes; change shared codes the employee knew
- [ ] IT: Remove from distribution lists, chat channels and shared mailboxes
- [ ] IT: Forward or delegate the mailbox to the manager for an agreed period and set the retention rule
- [ ] IT: Back up or preserve the employee's data according to the retention policy and any legal hold
- [ ] IT: Wipe and reimage returned devices after any required data preservation
- [ ] Admin: Remove from website, org chart, company directory and any authorized signatory lists, bank mandates or vendor portals

PAY, BENEFITS AND PAPERWORK

- [ ] Payroll: Process final paycheck by the state deadline, including hours through last day, overtime, commissions and bonuses owed
- [ ] Payroll: Pay out accrued, unused PTO where required by state law or company policy
- [ ] Payroll: Process any lawful deductions agreed in writing (check state rules before deducting for unreturned property)
- [ ] Finance: Settle outstanding expense reports and advances
- [ ] Benefits: Set benefits end dates and send the COBRA election notice through the plan administrator
- [ ] Benefits: Provide information on 401(k) account options, life insurance conversion, FSA and HSA balances
- [ ] HR: Give any state-required separation or unemployment notices
- [ ] HR: Confirm forwarding address and personal email for the Form W-2 and later correspondence
- [ ] HR: Provide copies of continuing agreements and a reminder of ongoing confidentiality obligations
- [ ] HR: If severance is offered, deliver the separation agreement with the legally required review and revocation periods

EXIT INTERVIEW AND CLOSE-OUT

- [ ] HR: Schedule exit interview or send exit survey (voluntary leavers in the last week; others where appropriate)
- [ ] HR: Record exit interview themes and share anonymized trends quarterly
- [ ] HR: Update employee status to terminated in the HRIS with correct separation date and reason code

- [ ] HR: Confirm rehire eligibility and record the reason
- [ ] HR: Close the personnel file and move it to the terminated-employee records with the correct retention date
- [ ] Manager: Thank the employee and, for voluntary leavers, invite them to stay in touch or join the alumni network
- [ ] HR: Final check that every section of this checklist is signed off

SIGN-OFF

HR offboarding owner: [Name] Signature: _____ Date: [Date]
Manager: [Name] Signature: _____ Date: [Date]
IT: [Name] Signature: _____ Date: [Date]