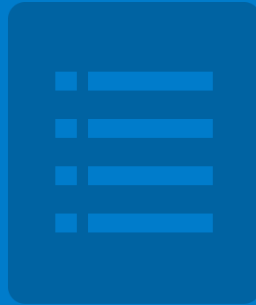


# Employee Offboarding Checklist

Follow these steps to ensure a seamless transition when an employee leaves your company.



## Communicate change quickly

- ☐ Employees superior informs HR and own department ASAP
- ☐ HR informs payroll and IT departments
- ☐ Wish the employee well in communications
- ☐ Give reasoning for departure where appropriate

## Prepare the paperwork

- ☐ Letter of resignation or termination
- ☐ Nondisclosure and noncompete agreements
- ☐ Benefits documents (PTO balances, 401k, insurance etc.)
- ☐ Tax documents (W-2, 1099-MISC etc.)
- ☐ Confirm details for last paycheck

## Initiate the knowledge transfer

- ☐ Have employee log important job details for replacement
- ☐ Consider having another worker shadow their final weeks
- ☐ Note any documents, files or projects that need to transfer

- ☐ Outline final work requirements and due dates

## Do the exit interview

- ☐ Ask for honest feedback, take all critiques seriously
- ☐ Share results with leadership, analyze for credibility
- ☐ Follow through and act on common complaints

## Have some fun

- ☐ Pass a best wishes card around the office
- ☐ Schedule a goodbye lunch or happy hour
- ☐ Give them a personalized going away gift

## Recover company assets

- ☐ Collect issued devices (computers, phones etc.)
- ☐ Take back any uniforms, keys, badges or security cards
- ☐ Close out any company credit cards or expense accounts
- ☐ Process any fees or reimbursements

## Leave the door open for a return

- ☐ Ensure employee contact information is up-to-date
- ☐ Extend invitation into alumni network
- ☐ Keep worker details in recruiting system

## Tie up loose ends

- ☐ Delete employee account from relevant systems
- ☐ Remove employee from any upcoming meetings
- ☐ Change System passwords
- ☐ Update the company org chart
- ☐ Redirect incoming calls/emails to superior
- ☐ Clean out their desk area