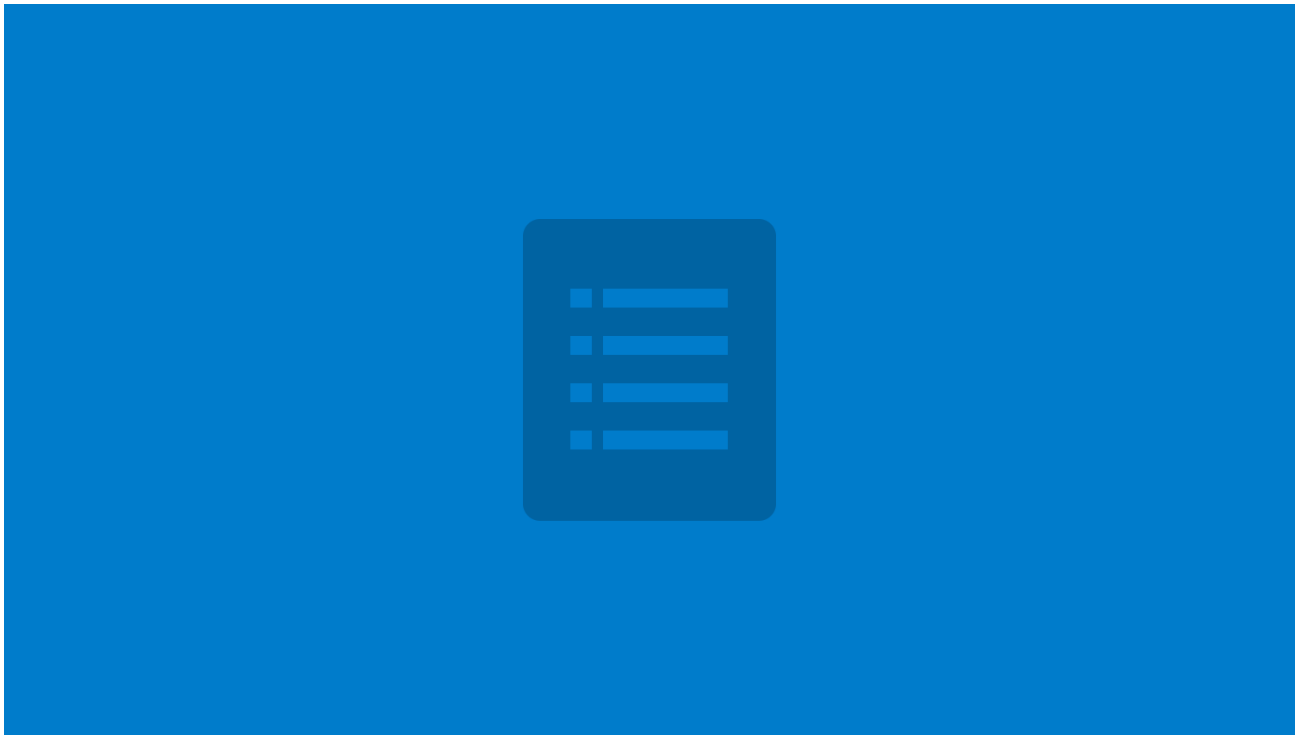
Employee Offboarding Checklist

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

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