

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