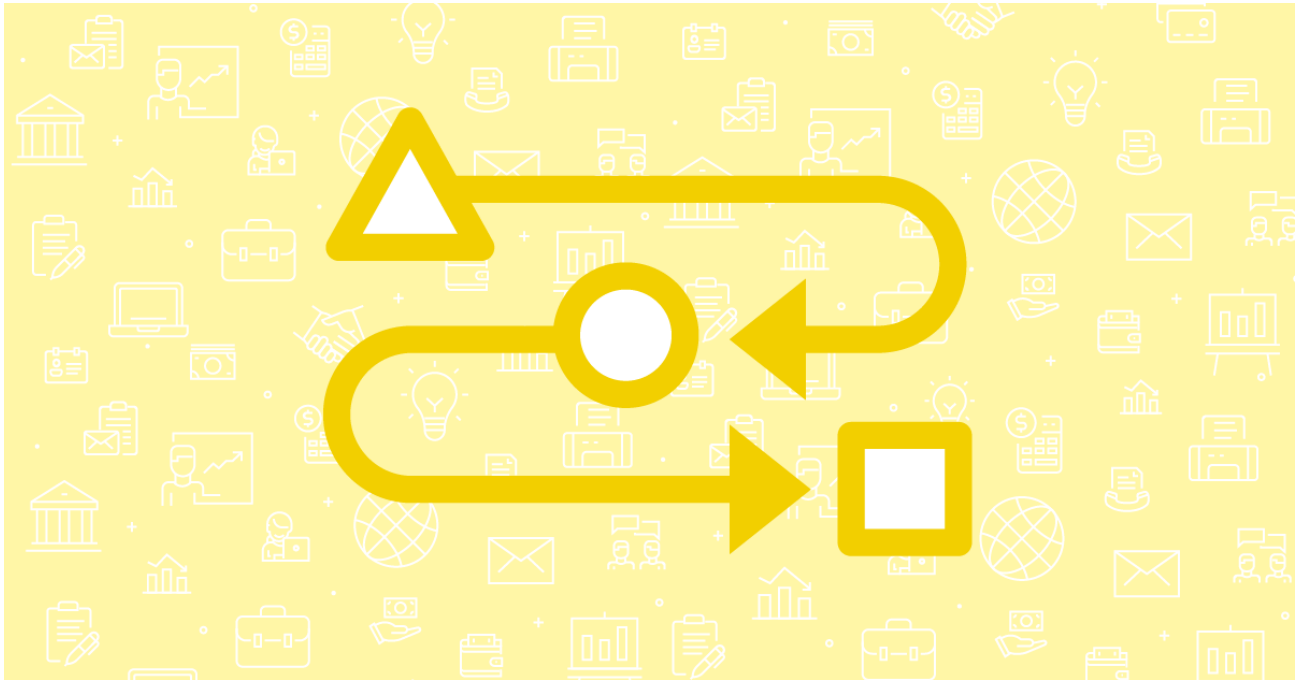# Employee Off-Boarding Checklist

Each time you end a contract with an employee or freelancer, complete these processes to ensure a smooth and efficient off-boarding experience for your team member.

- [ ] Professional thank your employee or freelancer for their time and work (meeting, phone, email, etc) However you usually communicate with each team member

- [ ] Begin the knowledge transfer process

  - [ ] Gather employee client knowledge (VIP clients, current situations,etc)

  - [ ] Project knowledge

  - [ ] Daily routine

  - [ ] All logins and passwords

- [ ] Prepare off-boarding paperwork

  - [ ] Letter of resignation or termination

  - [ ] Non-disclosure and non-compete agreements

  - [ ] Employee benefits document(s)

- [ ] Recover all company assets

- [ ] Revoke access to all internal and external platforms and software

- [ ] Change passwords to all internal and external platforms and software

- [ ] Announce team members departure to the rest of the team or company

- [ ] Schedule an exit interview

- [ ] Plan a good-bye gift, lunch, card, etc for employee

- [ ] Update employee directory

- [ ] Begin transfer of responsibilities or onboarding of new employee
- [ ] Update payroll (send out last payroll check and end employment in payroll system)
- [ ] Write a letter of recommendation (if requested)
- [ ] End employment (change status of employee)
  - [ ] Remove employee from all communication forms
  - [ ] Remove employee from all upcoming meetings and projects
  - [ ] Update employment status with insurance provider, 401K, benefits, payouts, etc
- [ ] Close/file employee folder
- [ ] Clean employees desk and have desk area ready for future employee