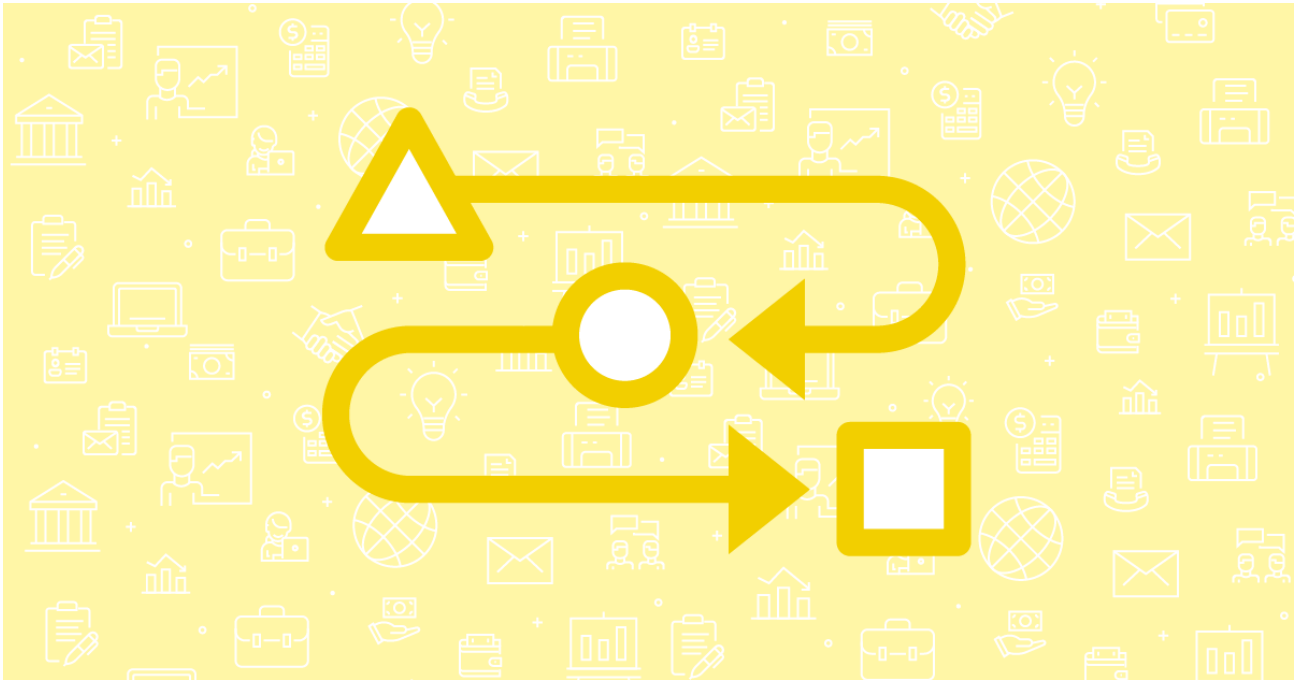


Employee Off-Boarding Checklist

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

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