

Employee Offboarding Checklist



1 Personalised Recommendation

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Schedule exit interview	HR Manager		<input type="checkbox"/>		
Prepare exit interview questions			<input type="checkbox"/>		
Conduct exit interview			<input type="checkbox"/>		

2 Knowledge transfer

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Identify ongoing projects and tasks	Employee/Manager		<input type="checkbox"/>		
Assign project responsibilities			<input type="checkbox"/>		
Update project documentation			<input type="checkbox"/>		
Conduct knowledge transfer sessions			<input type="checkbox"/>		
Provide access to shared resources			<input type="checkbox"/>		

3 Return of Company Property

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Collect company laptop	IT Department		<input type="checkbox"/>		
Collect mobile phone			<input type="checkbox"/>		
Collect access cards/keys			<input type="checkbox"/>		
Collect company credit card			<input type="checkbox"/>		
Collect uniforms/company apparel			<input type="checkbox"/>		
Collect other equipment (specify)			<input type="checkbox"/>		

4 Access Revocation

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Revoke email and system access	IT Department		<input type="checkbox"/>		
Revoke VPN/remote access			<input type="checkbox"/>		
Revoke internal platform access			<input type="checkbox"/>		
Revoke external accounts access			<input type="checkbox"/>		
Revoke building and facility access			<input type="checkbox"/>		
Revoke administrative rights			<input type="checkbox"/>		

5 Final Payroll and Benefits

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Calculate final paycheck	Payroll department		<input type="checkbox"/>		
Review unused vacation/sick leave			<input type="checkbox"/>		
Process severance pay (if applicable)			<input type="checkbox"/>		
Provide benefits information (e.g., COBRA)			<input type="checkbox"/>		
Address pension and retirement plan details			<input type="checkbox"/>		

6 Legal and Compliance

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Sign non-disclosure agreement (NDA)	Legal department		<input type="checkbox"/>		
Collect signed resignation letter			<input type="checkbox"/>		
Review non-compete clauses			<input type="checkbox"/>		
Provide certification of employment			<input type="checkbox"/>		
Ensure compliance with employment laws			<input type="checkbox"/>		

7 Update Records

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Update HR system with departure date	HR Assistant		<input type="checkbox"/>		
Notify payroll and benefits providers			<input type="checkbox"/>		
Update organisational charts			<input type="checkbox"/>		
Archive employee files			<input type="checkbox"/>		

8 Farewell and Transition

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Announce departure to team/company	Manager		<input type="checkbox"/>		
Plan farewell event or meeting			<input type="checkbox"/>		
Prepare farewell package (e.g., letters, gifts)			<input type="checkbox"/>		
Ensure a positive exit experience			<input type="checkbox"/>		

9 Post-Exit Follow-Up

Task	Responsibility	Due Date	Completed	Notes	Date Completed
Send follow-up survey for feedback	HR Manager		<input type="checkbox"/>		
Maintain alumni network			<input type="checkbox"/>		
Consider opportunities for rehiring			<input type="checkbox"/>		
Ensure a positive exit experience			<input type="checkbox"/>		