# [Company Name] Employee Offboarding Checklist Template

***NOTE:*** *This template has been put together as a guide. Please ensure you customize and include any relevant legal requirements for your region.*

#### Pre-Exit Preparation:

* Notify relevant departments (HR, IT, Finance, etc.) of the employee's departure.
* Review the employee’s file to check for any specific contractual terms regarding notice periods, benefits, or post-employment obligations.
* Schedule an exit interview with the employee (if applicable).
* Prepare final pay details (including any unused vacation, sick leave, and other benefits).
* Create an exit package with necessary documents (severance agreements, benefits information, etc.).

#### Knowledge Transfer:

* Ensure that all key responsibilities are transferred to a designated colleague or manager.
* Prepare a knowledge transfer document with key project information, deadlines, contacts, and procedures.
* Schedule a meeting to discuss ongoing tasks with the employee and relevant team members.
* Document any pending projects and ensure that they are appropriately reassigned or completed.

#### Company Property Return:

* Collect company property from the employee, including:
	+ Laptop/computer
	+ Mobile phone
	+ Keys (office, building, etc.)
	+ ID badge/Access cards
	+ Company credit cards or accounts
	+ Uniforms (if applicable)
	+ Any other company property (tools, equipment, etc.)
* Confirm the return of all physical and digital files, such as:
	+ Physical documents
	+ Documents stored on personal devices or cloud storage
	+ Files shared via email or other platforms

#### IT and System Access:

* **Revoke access to all company systems** (email, internal communications tools, project management software, HR systems, etc.).
* **Change or remove passwords** for shared accounts and sensitive systems.
* **De-provision company email account**, set up an out-of-office reply (if applicable), and forward messages to the appropriate contact.
* **Ensure the return of company-issued devices** (laptop, phone, etc.) and check for any personal data that must be deleted.

#### Final Pay and Benefits:

* **Process the final paycheck**, ensuring it includes:
	+ Payment for unused vacation days and sick leave
	+ Any outstanding overtime, bonuses, or commissions
	+ Severance pay (if applicable)
* **Provide documentation for benefits continuation** (healthcare, pension plans, etc.), including any options for COBRA or health insurance continuation.
* **Reimburse the employee for any outstanding business expenses** (e.g., travel, supplies, etc.).

#### Exit Interview:

* **Conduct the exit interview** (if applicable) to gather feedback on the employee’s experience and reasons for leaving.
* **Document insights** from the exit interview to identify areas of improvement within the company (management, culture, processes).
* **Ensure confidentiality** of any feedback shared during the exit interview.

#### Continuation of Benefits:

* **Inform the team** **and relevant departments** of the employee’s departure.
	+ Notify managers, direct reports, clients, and partners as necessary.
	+ Ensure that internal systems reflect the employee’s departure (email, project management tools, HR system, etc.).
* **Update the company directory** and other communication tools with the employee’s departure details.
* **Prepare a farewell email** or message acknowledging the employee’s contributions (if appropriate).

#### Post Exit Tasks:

* **Update HR and payroll records** to reflect the employee’s departure.
* **Disable access to company systems** after the employee’s last day (email forwarding, cloud storage, etc.).
* **Ensure the employee’s departure is reflected in any legal or contractual obligations**, including severance agreements, non-compete clauses, and intellectual property concerns.

#### Legal and Compliance Considerations:

* **Ensure compliance with relevant labor laws** (final paycheck timing, benefits continuation, severance pay, etc.).
* **Review any contractual agreements**, such as non-disclosure agreements (NDAs) or non-compete clauses, to ensure proper legal compliance after the employee’s departure.
* **Confirm return of all intellectual property** and company assets before the final day.

#### Feedback and Record Keeping:

* **Store all relevant documents** (exit interview feedback, final pay details, etc.) in the employee’s file for future reference.
* **Review feedback** to identify areas for improvement in the offboarding process or to enhance retention strategies.

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***NOTE:****Please remove the following when using this form.*

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