[Company Name] Employee Offboarding Checklist Template

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1. 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.).

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2. 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.

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3. 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

4. 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.

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5. 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.).

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6. 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.

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7. 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).

8. **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.

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9. **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.

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10. **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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