**Offboarding Checklist**

|  |  |
| --- | --- |
| Employee Name: | Employee ID: |
| Department: | Title: |
| Phone Number: | Email: |
| Address: | Date of Departure: |

**Employee’s Knowledge**

***Schedule a meeting between the employee and their direct supervisor. During the meeting, make sure you collect the following information:***

|  |  |
| --- | --- |
| Details about any of the employee’s incomplete projects and upcoming action items | ☐ |
| A description of the employee’s standard work, including all daily and monthly tasks | ☐ |
| Location of important files like audits, reports, assessments, etc. | ☐ |
| Details regarding the employee’s direct reports and any managerial issues that are pending  (If the employee is a member of the leadership team) | ☐ |
| Helpful resources that make it easier to do the employee’s job | ☐ |

**Administrative Tasks**

***Make sure you complete these important administrative tasks related to employee offboarding:***

|  |  |
| --- | --- |
| File non-disclosure agreement and/or non-compete agreement | ☐ |
| Prepare employee tax documents | ☐ |
| Notify payroll of departure date | ☐ |
| Conduct an exit interview and document findings | ☐ |
| Update organizational chart | ☐ |

**Company Assets**

***Collect the following equipment from your employee before their departure date:***

|  |  |
| --- | --- |
| Computer or laptop (including charging cables, speakers, monitors, and accessories) | ☐ |
| Building access card(s) | ☐ |
| Parking pass | ☐ |
| Company-issued PPE and/or uniform | ☐ |
| Mobile phone | ☐ |
| Radio/headset | ☐ |

**IT Tasks**

***Reset the following digital access points:***

|  |  |
| --- | --- |
| Employee email | ☐ |
| Employee phone number | ☐ |
| Shared department passwords and login credentials | ☐ |
| Multi-factor authentication accounts | ☐ |
| Access to online banking information | ☐ |
| Access to company servers and storage locations | ☐ |