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# OFFBOARDING CHECKLIST

| EMPLOYEE | JOB TITLE / TEAM | LAST DAY | REASON (RESIGNED, RETIRED, ENDED) |
|---|---|---|---|
| | | | |

## NOTICE AND PLANNING

- ❑ Resignation / termination letter on file _____
- ❑ Last day confirmed in writing _____
- ❑ Team and clients told (agreed message) _____
- ❑ Handover plan and owner agreed _____
- ❑ Exit interview booked _____

## HANDOVER

- ❑ Open work listed and reassigned _____
- ❑ Files moved to shared drive _____
- ❑ Passwords for shared accounts handed over _____
- ❑ Client contacts introduced to new owner _____
- ❑ Email auto-reply and forwarding set _____

## LAST DAY

- ❑ Equipment returned (see log) _____
- ❑ Keys, badge, cards returned _____
- ❑ Accounts disabled at end of day _____
- ❑ Exit interview held _____
- ❑ Thank-you and goodbye _____

## PAY AND BENEFITS

- ❑ Final paycheck by state deadline _____
- ❑ Unused PTO paid if policy or law requires _____
- ❑ Expense claims settled _____
- ❑ Benefits end date confirmed _____
- ❑ COBRA notice sent (if applicable) _____
- ❑ Retirement plan info sent _____
- ❑ Final W-2 address confirmed _____

## RECORDS AND FOLLOW-UP

- ❑ Personnel file updated and closed _____
- ❑ Payroll and HR system set to terminated _____
- ❑ Unemployment notice given where required _____
- ❑ Company website, org chart updated _____
- ❑ Software seats removed / reassigned _____
- ❑ Reference policy explained _____