

Offboarding Checklist

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| --- | --- | --- | --- | --- | --- |
| **Who’s Leaving & When?** | | | | | |
| **Employee Name:** |  | | | **Employee ID:** |  |
|  | | | | | |
| **Termination Type:** | Voluntary | Involuntary |  | | |
|  | | | | | |
| **Resignation Date:** |  |  | | | |
| **Termination Reason:** |  |  | | | |
| **Last Day Worked** |  |  | | | |
| **Final Paycheck Due:** |  |  | | | |
|  | | | | | |
| **Communication** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| Resignation Letter Received? | Yes | No |  |  |  |
| Termination Letter or Severance Letter Provided? | Yes | No |  |  |  |
| Vendors/Customers Notified? | Yes | No |  |  |  |
| Manager/s Notified? | Yes | No |  |  |  |
| Employee's Notified? | Yes | No |  |  |  |
| Employees Updated Contact Information Received? | Yes | No |  |  |  |
|  | | | | | |
| **Company Assets** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| **Large Assets** | | |  |  |  |
| Cell Phone returned? | Yes | No |  |  |  |
| PC/Laptop returned? | Yes | No |  |  |  |
| Credit Card returned? | Yes | No |  |  |  |
| Company vehicle returned? | Yes | No |  |  |  |

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| --- | --- | --- | --- | --- | --- |
|  | | | **Date?** | **Who?** | **Details?** |
| **Other Items** | | |  |  |  |
| Company Vehicle Keys? | Yes | No |  |  |  |
| Office Keys? | Yes | No |  |  |  |
| Badge? | Yes | No |  |  |  |
| Manuals? | Yes | No |  |  |  |
| Files? | Yes | No |  |  |  |
| Tools? | Yes | No |  |  |  |
| Uniforms? | Yes | No |  |  |  |
| Other? | Yes | No |  |  |  |
|  | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| **Technology Access** | | |  |  |  |
| Email and shared accounts disabled? | Yes | No |  |  |  |
| Phone number and voicemail changed or  disabled? | Yes | No |  |  |  |
| Computer access and/or  VPN removed? | Yes | No |  |  |  |
| Timeclock code and building access revoked? | Yes | No |  |  |  |
| Software accounts disabled (list all under  details)? | Yes | No |  |  |  |
|  | | | | | |
| **HR/Payroll Tasks** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| **Expense Reporting** | | |  |  |  |
| Employee expense reports received? | Yes | No |  |  |  |
|  | **Amount to reimburse:** |  |  | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | | | **Date?** | **Who?** | **Details?** |
| **Health Insurance** | | |  |  |  |
| Is employee enrolled in health insurance? | Yes | No |  |  |  |
| Does employee have a health saving account? | Yes | No |  |  |  |
| Is COBRA required? | Yes | No |  |  |  |
| Are insurance premiums due? | Yes | No |  |  |  |
| What date will insurance  end? |  |  | | | |
|  | **Amount to deduct:** |  |  | | |
|  | | | | | |
| **Time Off** | | |  |  |  |
| Remaining PTO? | Yes | No |  |  |  |
| Remaining Sick Leave? | Yes | No |  |  |  |
| Are these to be paid out? | Yes | No |  |  |  |
|  | **Amount to reimburse:** |  |  | | |
|  | | | | | |
| Excess PTO time taken? | Yes | No |  |  |  |
| Excess sick time taken? | Yes | No |  |  |  |
| Are these to be deducted from final check? | Yes | No |  |  |  |
|  | **Amount to deduct:** |  |  | | |
|  | | | | | |
| **Loans & Misc Deductions** | | |  |  |  |
| Does employee have out- standing loans? | Yes | No |  |  |  |
| Does employee owe for materials or equipment? | Yes | No |  |  |  |
| Are these to be deducted from final check? | Yes | No |  |  |  |
|  | **Amount to deduct:** |  |  | | |

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| **Legal Notices & Files** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| Resignation or termination letter signed and received? | Yes | No |  |  |  |
| COBRA documentation prepared and provided? | Yes | No |  |  |  |
| NDA Signed? | Yes | No |  |  |  |
| NCA Signed? | Yes | No |  |  |  |
| Does employee agree to allow business to provide employment verification? | Yes | No |  |  |  |
|  | | | | | |
| **Records Management** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| Termination reason and documents filed in employee personnel folder? | Yes | No |  |  |  |
| Employee's paper and electronic files moved to termination status and filed with term files. | Yes | No |  |  |  |
|  | | | | | |
| **Exit Interview** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| Exit Interview Scheduled? | Yes | No |  |  |  |
| Exit Interview Conducted? | Yes | No |  |  |  |
|  | | | | | |
| **Payroll Processing** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| Deductions gathered? | Yes | No |  |  |  |
| Time card received and/ or hours input? | Yes | No |  |  |  |
| Earned, unused (or excess used) PTO added? | Yes | No |  |  |  |
| Severance (if offered) added? | Yes | No |  |  |  |

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| --- | --- | --- | --- | --- | --- |
|  | | | **Date?** | **Who?** | **Details?** |
| Final check provided to employee? | Yes | No |  |  |  |
| Employee changed to term status in payroll system? | Yes | No |  |  |  |
|  | | | | | |
| **Other** | | | | | |
|  | | | **Date?** | **Who?** | **Details?** |
| Employee's personal belongings removed? | Yes | No |  |  |  |
| Office cleaned? | Yes | No |  |  |  |
| Nameplate removed? | Yes | No |  |  |  |
| Checklist completed and filed in employee's folder? | Yes | No |  |  |  |