

Offboarding Checklist

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			

			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 outstanding 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:				

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			

			Date?	Who?	Details?
Final check provided to employee?	Yes	No			
Employee changed to term status in payroll system?	Yes	No			

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Other					
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			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			