

Employee offboarding checklist

ONBOARDING CHECKLIST TEMPLATE

Employee _____ Role _____ Start date _____

Buddy or manager _____

Offboarding From the resignation to the last day

TASK	DUE	DATE	INITIALS
When they resign			
☐ Get the resignation in writing, and confirm the last day and notice period	Week 1		
☐ Send a written acknowledgment with the last day and what happens next	Week 1		
☐ Agree with them how and when the team and clients will be told	Week 1		
☐ Plan who will cover their work, and whether to hire a replacement	Week 1		
Handover			
☐ Have them complete the employee handover document Their work in progress, recurring tasks, contacts, systems and where things are kept.	Before the last week		
☐ Record any task only they know how to do, step by step	Before the last week		
☐ Hold handover meetings with the people taking on their work	Last week		
☐ Introduce the new contact to clients and suppliers	Last week		
Equipment and access			
☐ List the equipment, keys, cards and accounts they hold	Last week		
☐ Collect the laptop, phone, keys, access card and uniform	Last day		
☐ Transfer ownership of files, mailboxes and shared accounts	Last day		
☐ Remove their access to every system, and change any shared passwords Including email, cloud apps, banking, building access and social media accounts.	Last day		
Pay and records			
☐ Calculate final pay, unused leave and any amounts owed	Last week		
☐ Process the final pay and the documents your rules require	Last day		
☐ Update the employee's file and close them in payroll and HR systems	Last day		
Exit			
☐ Hold an exit interview, and record what you learn	Last week		
☐ Thank them, and agree whether you can be a reference	Last day		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____