

EMPLOYEE OFFBOARDING CHECKLIST



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01. NOTIFICATION & COMMUNICATION

- Receive Written Resignation/Notice**
Ensure employee submits an official resignation letter or receive HR notification in case of layoffs.
- Acknowledge Employee's Departure**
Send a confirmation email acknowledging their departure and outlining next steps.
- Notify Relevant Departments**
Inform IT, payroll, security, and other relevant departments about the employee's last working day.
- Announce Departure**
Notify the team or organization, following company protocol (respecting privacy as needed).

02. KNOWLEDGE TRANSFER

- Plan Knowledge Transfer**
Arrange a knowledge transfer process to ensure continuity (e.g., document work processes, train successors).
- Identify Successor(s)**
Confirm or assign who will take over the employee's responsibilities.
- Handover Critical Documents/Projects**
Inform IT, payroll, security, and other relevant departments about the employee's last working day.

03. IT & SECURITY MEASURES

- Revoke System Access**
Remove or disable access to company email, network accounts, internal systems, and any third-party applications.
- Retrieve Company Devices**
Collect laptops, phones, security badges, key cards, and other company-owned equipment.
- Change Passwords/Access Codes**
Change or remove access to shared accounts, including cloud storage, project management tools, and sensitive data.

04. EXIT INTERVIEW

- Schedule Exit Interview**
Set up a confidential meeting to gather feedback about the employee's experience with the company.
- Exit Interview Form**
Have a standardized set of questions to guide the conversation (reason for leaving, comments on work environment, suggestions for improvement).
- Document Feedback**
Record key points of the discussion for future improvements.



05. FINAL PAY & BENEFITS

- **Calculate Final Pay**
Confirm any remaining compensation, including unpaid wages, bonuses, and unused vacation time.
- **Benefits Information**
Provide information on benefits continuation (retirement plan rollovers, etc.), if applicable.
- **Expense Reimbursement**
Ensure all outstanding work-related expenses are reimbursed.

07. TRANSITION PERIOD & FAREWELL PROCESS

- **Plan Team Farewell Event (if appropriate)**
Organize a team farewell meeting or event, respecting the nature of the departure.
- **Update Employee's Contact Information**
Collect updated personal contact details for final pay, benefits information, or future reference.
- **Send Thank You Note**
Send a personalized farewell message or thank you note acknowledging their contributions.



06. LEGAL & COMPLIANCE

- **Obtain Signed Non-Disclosure /Confidentiality Agreement**
Ensure any confidentiality agreements remain valid after departure.
- **Return of Sensitive Data and Company Property**
Verify that any proprietary information has been returned and no confidential files are retained by the employee.
- **Conduct Final Compliance Checks**
Complete any compliance requirements (e.g., tax forms, exit documentation).

06. POST-EXIT FOLLOW-UP

- **Collect Feedback from Teams**
Ask remaining team members if there are any challenges or gaps after the employee's departure.
- **Review Offboarding Process**
Evaluate whether the offboarding process was followed smoothly and identify areas for improvement.

ADDITIONAL NOTES

Departure-specific considerations:

- For layoffs: Offer severance details and support resources, if applicable.
- For retirement: Organize a retirement celebration and ensure pension/benefits details are clear.