

Smooth Transitions: The Essential Employee Offboarding Checklist

Notification & Documentation

- Resignation & Termination Letter:**
 - Receive and acknowledge the resignation or termination letter.
 - Confirm the last working day.

- Exit Interview:**
 - Schedule and conduct an exit interview to gather feedback.
 - Document the reasons for leaving and any suggestions for improvement.

Communication

- Internal Notification:**
 - Inform relevant departments (IT, Payroll, Security, etc.) about the employee's departure.
 - Notify team members and relevant stakeholders of the departure.

- Client/Vendor Notification:**
 - Provide contact information for a new point of contact.
 - Communicate the employee's departure to clients and vendors, if applicable.

Knowledge Transfer

- Handover Plan:**
 - Develop a handover plan to ensure a smooth transition of duties.
 - Identify and document ongoing projects, key contacts, and important information.

- Training Successor:**
 - Arrange for the departing employee to train their successor or colleagues.

Return of Company Property

- Collect Assets:**
 - Retrieve company property, including laptops, phones, ID badges, access cards, keys, and any other equipment.
 - Ensure the return of company credit cards, parking passes, and any other company-issued items.

- Access Termination:**
 - Disable access to company systems, email, and networks.
 - Revoke access to any external accounts or software subscriptions.

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Final Payments & Benefits

- **Final Paycheck:**
 - Calculate and issue the final paycheck, including any unpaid wages, accrued vacation, and other owed amounts.
 - Ensure compliance with state laws regarding the timing of the final paycheck.
- **Benefits Termination:**
 - Notify the employee about the end date of their benefits coverage.
 - Provide information on COBRA or other benefits continuation options, if applicable.
- **Retirement Plans:**
 - Explain options for handling retirement plans, such as 401(k) rollovers or distributions.

Compliance & Documentation

- **Update Records:**
 - Update employee records to reflect the termination.
 - Ensure all required documentation is completed and filed.
- **Legal Compliance:**
 - Ensure compliance with all relevant labor laws and regulations regarding termination.
 - Provide any required notices or documentation to the employee.

Exit Feedback

- **Exit Survey:**
 - Provide an exit survey to gather additional feedback.
 - Analyze exit interview and survey results for insights and trends.

IT & Security

- **Data Backup:**
 - Ensure all necessary data and files are backed up from the employee's devices.
 - Transfer relevant data to the appropriate team members or departments.
- **Security Measures:**
 - Change passwords and security codes that the employee had access to.
 - Monitor for any unusual activity on the employee's accounts post-departure

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