Offboarding Checklist

This is a ready-made checklist template for you to keep organized and track all the tasks one-by-one. You can use the Status column to checkmark your completed tasks.

Category	Item Name	Priority	Assignee	Status
Pre-Offboarding	Schedule exit interview	High		
Pre-Offboarding	Notify IT department	High		
Pre-Offboarding	Notify payroll	High		
Pre-Offboarding	Notify team and stakeholders	Medium		
Pre-Offboarding	Plan knowledge transfer	High		
Documentation	Collect resignation letter	High		
Documentation	Provide termination letter	High		
Documentation	Complete exit interview form	Medium		
Documentation	Update employee records	Medium		
Documentation	Process final paycheck	High		
Knowledge Transfer	Document current projects	High		
Knowledge Transfer	Transfer responsibilities	High		
Knowledge Transfer	Train replacement or team	High		
Knowledge Transfer	Update project documentation	Medium		
Knowledge Transfer	Share contact information for ongoing work	Medium		
IT and Access	Disable email and accounts	High		
IT and Access	Collect company devices	High		
IT and Access	Revoke system access	High		
IT and Access	Change passwords	Medium		
IT and Access	Collect security badges and keys	High		
Return of Property	Collect company credit cards	High		
Return of Property	Collect company documents	Medium		
Return of Property	Collect office supplies	Medium		
Return of Property	Collect uniforms or work attire	Low		
Benefits and Payroll	Explain benefits termination	High		
Benefits and Payroll	Process COBRA information	High		
Benefits and Payroll	Settle any outstanding expenses	High		
Benefits and Payroll	Update pension or retirement plans	Medium		
Post-Exit	Conduct exit interview	High		
Post-Exit	Review exit interview feedback	Medium		
Post-Exit	Communicate exit details to team	Medium		
Post-Exit	Reflect on offboarding process	Medium		

NOTES & COMMENTS