

# Employee Offboarding Checklist

## *Navigate Voluntary Terminations With Confidence*

A structured offboarding process protects your organization, preserves critical knowledge, and strengthens your employer brand – turning departing employees into advocates. Leverage this checklist to ensure your offboarding process for voluntary terminations is consistent, compliant, and comprehensive.

### Initial Steps

- Thank the departing employee for their contributions to the organization.
- Notify all relevant individuals, including leadership, HR, and IT, that the offboarding process is starting.
- Ask HR to prepare the departing employee's final paycheck and all necessary paperwork, including resignation or retirement letter, nondisclosure and non-compete agreements, explanation of benefits, COBRA notice, retirement plan transfer, and unemployment insurance, if applicable.
- Review the offboarding process with the departing employee, including timeline and expectations, and provide them with a copy of an offboarding checklist or communication detailing expectations.
- Create and document a transition plan with the departing employee to ensure knowledge transfer is completed before their last day.
- Schedule an exit interview with the departing employee.
- Ask HR or another neutral individual to conduct an exit interview with the departing employee and document all feedback.
- Notify the departing employee's team, wider organization, and clients, if applicable, of their departure and last day.
- Begin recruiting to fill the departing employee's position, if necessary.



### Knowledge Transfer

- Decide which employee(s) will assume the departing employee's responsibilities, if necessary, and communicate the new responsibilities to them.
- Have the departing employee document all necessary information to facilitate a knowledge transfer, including their roles and responsibilities, projects, deliverables, client or vendor contacts, and access to documents.
- Have the departing employee return all work-related documents and other information.

## Knowledge Transfer *(cont.)*

- Schedule a meeting with the departing employee and any employees assuming their responsibilities to transfer all necessary information, documents, files, etc.
- Provide relevant vendors, clients, and other employees with an updated point of contact.
- Schedule meetings with the departing employee's vendors, clients, and others to transition to the new point of contact, if necessary.

## Devices & Access

- Create or refer to an existing list of all devices and equipment to collect, such as keys, badges, access cards, phones, credit cards, and uniforms.
- Provide the departing employee with a date, time, and location to return all devices and equipment. If they work remotely, arrange a date and time for a courier to collect the items.
- Remove the departing employee's access to all systems, software, apps, and files. If they work remotely, terminate their VPN and remote desktop access.
- Retain and store records in compliance with the organization's retention policies and any legal requirements, including any HR information system or human capital management profiles.
- Deactivate the departing employee's profiles on all systems, software, and apps.
- If the departing employee used their personal devices for work, schedule a time to remove all files and access from those devices.
- Forward the departing employee's emails, telephone calls, voicemails, and any other communications to other employees before their last day.

## Exit Interview

- Conduct an exit interview with the departing employee and document all feedback.
- Provide the departing employee with information regarding any final payments, including paychecks, bonuses, or severance payments, as well as any reference letter and other exit documentation.
- Thank the departing employee for their contributions to the organization. If the departing employee is leaving on good terms, consider discussing options or policies for potential rehire.

### Enhance Offboarding Efficiency With CBIZ



A modern Human Resources Information System (HRIS) can streamline offboarding by automating workflows, tracking equipment and system access, and ensuring accountability across teams. With the right technology and guidance, your organization can reduce risk, improve efficiency, and create a more consistent employee experience.

CBIZ helps organizations design and implement smarter HR processes, from onboarding to offboarding and beyond. [Connect with our team to learn how we can support your workforce strategy.](#)