Employee offboarding checklist

> *A general template, not legal advice. Check it against local law and your own policies before you use it.*

The tasks for an employee who is leaving: confirming the leaving date, the handover, final pay and documents, equipment and access, the exit conversation and the records.

How to use this checklist

Use this checklist whenever an employee leaves, for any reason. Give every task a named owner and a due date, treat the leaver with respect and keep personal details confidential.

Employee name _____

Job title _____

Manager _____

Last working day _____

Reason for leaving _____

HR contact _____

When the leaving is confirmed

- ☐ Receive the resignation in writing, or give notice in writing, as the contract and [company name]'s process require.
- ☐ Confirm the last working day and the notice arrangements in writing.
- ☐ Tell [payroll, IT and facilities] the leaving date.
- ☐ Agree how and when the team and any clients are told.
- ☐ Check the leave balance and how any remaining leave is handled: [taken before leaving, paid, or your own rule].

Handover

- ☐ Agree a handover plan: open tasks, documents, contacts and the shared tools the leaver uses.
- ☐ Move files to shared storage and transfer the ownership of documents and accounts.
- ☐ Introduce the people who take over the work to colleagues and clients.
- ☐ Update rotas, schedules and approval routes.

Final pay and documents

- ☐ Prepare the final pay: pay up to the last day and [leave, expenses, bonuses or deductions your company handles].

- [ ] Settle open expense claims and any loans or advances.
- [ ] Prepare the documents the leaver receives: [final payslip, confirmation of employment, reference, and the pay or tax documents your company provides].
- [ ] Explain what happens to benefits and pension arrangements: [details for your company].

Equipment and access

- [ ] Collect equipment: [laptop, phone, access card, keys, uniform or tools].
- [ ] Remove access to systems on [date and time], including email, shared drives and outside tools.
- [ ] Set up email forwarding or an automatic reply, if your company uses them.
- [ ] Change any shared passwords and door codes the leaver knew.

Exit conversation

- [ ] Offer an exit interview and record the feedback.
- [ ] Remind the leaver of any duties that continue under the contract, such as confidentiality.
- [ ] Thank the leaver and confirm how to reach [company name] with questions later.

Records

- [ ] Update the employee record with the leaving date and the reason.
- [ ] Keep the leaver's records for [retention period], then delete them as your policy says.
- [ ] Keep the completed checklist with the employee record.

Sign-off

Completed by _____

Date _____

Manager signature _____