

# Offboarding Checklist

A complete process for offboarding a departing employee, from knowledge transfer to access revocation.

## When Notice Is Given

- Confirm the resignation or termination details in writing
- Record the agreed last working day and notice period
- Notify HR, IT, payroll, and facilities of the departure  
Early notice gives every team time to plan.
- Review any contract terms, notice obligations, or agreements
- Plan the communication to the team and clients
- Outline the knowledge transfer and handover plan

## Plan Knowledge Transfer

- List the departing employee's key responsibilities and projects
- Identify who will take over each task or account
- Have the employee document processes and login locations
- Schedule handover sessions with the receiving teammates
- Transfer ownership of files, documents, and shared resources
- Capture contacts, vendor details, and ongoing commitments  
Write down what only this person knows.

## Transition Work and Projects

- Reassign open tasks and active projects to new owners
- Update project tools and trackers with the new assignees
- Introduce successors to clients and external partners
- Reroute the employee's email and shared inbox responsibilities
- Confirm deadlines and deliverables are covered after the last day
- Document any unfinished work and its current status

## Revoke Access and Secure Data

- Schedule account deactivation for the end of the last day
- Disable email, single sign-on, and VPN access on schedule
- Remove the employee from all systems, apps, and groups
- Revoke building badges, keys, and physical access codes
- Reset shared passwords the employee had access to  
Rotate any credentials they knew, not just personal ones.
- Back up and transfer needed data before closing accounts

## Collect Equipment and Assets

- List all company equipment assigned to the employee
- Arrange return of laptop, phone, monitor, and accessories
- Collect badges, keys, credit cards, and parking passes
- For remote staff, send a prepaid return label and instructions
- Inspect returned equipment and update the asset log

- Wipe and reissue or store returned devices securely

Confirm data is removed before redeployment.

## **Close Out and Say Goodbye**

- Confirm final pay, expenses, and benefits with payroll and HR
- Hold an exit interview to gather candid feedback
- Communicate the departure and new contacts to the team
- Update the org chart, directory, and distribution lists
- Thank the employee and acknowledge their contributions
- Archive the employee record per your retention policy

Retention rules vary; follow local laws and HR guidance.