



Employee Offboarding Checklist

A cross-functional checklist for coordinating departure communications, access, property, records, and final follow-up.

PURPOSE	Create clear ownership and evidence for a consistent employee departure process.
BEST FOR	Managers, HR, payroll, IT, facilities, and operations teams.

Employee	_____	Role	_____
Department	_____	Manager	_____
Last working day	_____	Departure type	_____
Coordinator	_____	Checklist date	_____

1. Before the last day

DONE	ACTION	OWNER / DATE
[]	Confirm approved last day and departure documentation	
[]	Create transition and knowledge-transfer plan	
[]	Identify customer, vendor, and internal communications	
[]	Review final-pay, leave, benefits, and expense processes	
[]	Schedule optional exit interview	
[]	Inventory accounts, equipment, keys, cards, and records	



2. Access, property, and records

DONE	ACTION	OWNER / DATE
☐	Disable or transfer system and application access	
☐	Recover equipment, keys, badges, cards, and documents	
☐	Transfer file ownership, shared mailboxes, and workflows	
☐	Update directories, websites, distribution lists, and schedules	
☐	Retain required employment and payroll records securely	

3. Final confirmation

DONE	ACTION	OWNER / DATE
☐	Send final pay / benefits contact information	
☐	Document unresolved items and responsible owner	
☐	Confirm completion with HR, IT, payroll, and manager	

Open items, exceptions, or follow-up

Use notes

Educational use only. This template is a general operational aid, not legal, tax, payroll, benefits, safety, or other professional advice. Adapt it to your organization, protect confidential information, verify current requirements, and consult qualified advisors when appropriate.

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