

Employee Offboarding Checklist

Employee offboarding can often feel like a fire drill. This checklist provides you with the steps to ensure offboarding is handled securely and professionally and no task is forgotten.

[Learn more about Electric's offboarding solution >](#)

| Internal Communications | |
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| Thank the employee for their contributions to your business, regardless of the circumstances of their departure | |
| Inform all relevant internal stakeholders that offboarding is being initiated | |
| Notify HR to prepare relevant paperwork, final paychecks, and termination of benefits | |
| Outline the offboarding process to the employee | |
| Inform the employee's team members and the wider company of their departure and finish date | |
| Create a transition plan | |
| Schedule an exit interview | |
| Initiate the process of recruiting for the employee's position, if applicable | |
| Handover Process | |
| Create an offboarding messaging channel to keep stakeholders informed of the offboarding process | |
| Ask the employee to document any required knowledge transfer | |
| Determine which team members will take over the departing employee's responsibilities, if applicable | |
| Inform team members of any temporary redistribution of responsibilities, re-routing of emails, etc. | |
| Notify internal and external stakeholders of their updated point of contact | |
| Schedule handover meetings with internal stakeholders and external clients, if applicable | |
| Device and System Access | |
| Create a list of all company devices, equipment, access cards, etc. to retrieve | |
| Inform the employee of when and where this equipment must be returned | |
| Create a list of all apps and files the employee has access to | |
| Inform the employee of when their access to company resources will be revoked | |
| Identify any files or systems that the employee has sole ownership of, and arrange for transfer of ownership | |
| Reset two-factor authentication (2FA) to remove the departing employee's contact details | |

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| If operating BYOD (Bring Your Own Device), arrange for company files and access to be removed from the employee's personal devices | |
| Deactivate the employee's profiles and revoke access to company systems, apps, and software on the appropriate date | |
| Re-route employee emails and any other critical communications on the appropriate date | |
| Remote Employees | |
| Arrange for all company equipment to be returned by courier, if applicable | |
| Remotely wipe or secure company devices before they are transferred to a courier | |
| Terminate VPN access | |
| Exit Interview | |
| Perform exit interview and document all feedback | |
| Ensure employee's personal contact details are up to date | |
| Provide employer reference and other exit documentation, if applicable | |