



Employee Offboarding Checklist Template

Our template helps your HR team manage offboarding tasks, ownership, and progress in one place. Based on a structured five-phase offboarding process.

How to use this checklist?

Use this employee offboarding checklist to track all tasks throughout the offboarding process. Assign one owner per task, set clear deadlines, and mark each item as completed.

DAY 1–3 AFTER NOTICE (HR & ADMIN)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Collect the resignation letter or document of termination	HR	Day 1	Required for compliance
<input type="checkbox"/>	Confirm the last working day	HR + Manager	Day 1–2	Align on notice period
<input type="checkbox"/>	Update employee record (end date)	HR	Day 1–2	Triggers payroll changes
<input type="checkbox"/>	Notify payroll (final pay + PTO)	HR	Day 1–2	Legal requirement
<input type="checkbox"/>	Send offboarding email	HR	Day 1–2	Outline next steps
<input type="checkbox"/>	Inform the manager and team	Manager	Day 1	Before the informal spread
<input type="checkbox"/>	Start the benefits continuation process	HR	Day 2–3	If applicable

FIRST 2 WEEKS (KNOWLEDGE TRANSFER)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Document active projects and status	Employee	Week 1	Written format only
<input type="checkbox"/>	List key contacts (clients, vendors)	Employee	Week 1	Include context
<input type="checkbox"/>	Reassign tasks in tools	Manager	Week 1	Update systems
<input type="checkbox"/>	Identify critical undocumented processes	Manager + Employee	Week 1	Tribal knowledge
<input type="checkbox"/>	Update SOPs/documentation	Employee	Week 1-2	Prioritize key workflows
<input type="checkbox"/>	Schedule handover sessions	Manager	Week 2	Before the final week
<input type="checkbox"/>	Transfer file ownership	IT / Employee	Week 2	Avoid data loss

FINAL WEEK (IT & ACCESS REVOCATION)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Schedule equipment return	HR / IT	Before the last day	Laptop, keys, cards
<input type="checkbox"/>	Set email forwarding/auto-reply	IT	Before the last day	For continuity
<input type="checkbox"/>	Revoke email access	IT	Last day	Not earlier
<input type="checkbox"/>	Revoke system access (CRM, Slack, HRIS)	IT	Last day	Full audit required
<input type="checkbox"/>	Revoke cloud/admin access	IT	Last day	Include shared accounts
<input type="checkbox"/>	Change shared passwords	IT	Last day	Common failure point

<input type="checkbox"/>	Archive email data	IT	Last day	Follow retention policy
<input type="checkbox"/>	Remove from communication channels	IT / HR	Last day	Slack, mailing lists

LAST DAY (EXIT)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Conduct an exit interview	HR	Last day	Prefer earlier if possible
<input type="checkbox"/>	Collect remaining equipment	HR / Manager	Last day	Confirm return
<input type="checkbox"/>	Provide reference letter (if applicable)	HR + Manager	Last day	Optional
<input type="checkbox"/>	Publicly acknowledge the contribution	Manager	Last day	Team message
<input type="checkbox"/>	Confirm final paycheck details	HR / Payroll	Last day	Avoid confusion

AFTER DEPARTURE (POST-OFFBOARDING)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Update org chart	HR	Within 1 week	Often missed
<input type="checkbox"/>	Communicate role changes	HR + Manager	Within 1 week	Reduce confusion
<input type="checkbox"/>	Archive employee records	HR	Within 1 week	Compliance requirement
<input type="checkbox"/>	Remove from payroll/benefits	HR / Payroll	Within 1 week	Confirm with finance

<input type="checkbox"/>	Log exit interview insights	HR	Within 1 week	Retention data
<input type="checkbox"/>	Review the role replacement strategy	Manager + Leadership	Within 2 weeks	Backfill vs restructure
<input type="checkbox"/>	Send follow-up “stay in touch” note	HR / Manager	30 days after	Alumni relationship

NOTES

- Assign **one clear owner per task**. Shared ownership leads to missed steps.
- Start the process **within 24 hours of confirmed departure** to preserve knowledge transfer.
- Revoke access **on the last day**, not earlier and not later, to balance security and continuity.
- Treat resignation, termination, and retirement differently in timing and tone.