



Ultimate Offboarding Checklist

By following this checklist, you ensure a harmonious and productive offboarding process, ensuring that both the departing employee and the company part ways on good terms.

☐ Communication

- Receive and accept the employee's formal resignation; confirm the final working day
- Inform the immediate superior and team of the employee's departure
- Announce the departure to the rest of the company

☐ Transition of Responsibilities

- Conduct a meeting to plan knowledge transfer and handover of ongoing projects
- Identify the new contact people for the tasks handled by the outgoing employee
- Review and reassign open tasks and roles of the departing employee

☐ Payroll and Final Settlement

- Ensure that final compensation, including unused leave and expenses, is calculated
- Set a date for final paycheck disbursement

☐ Exit Interview

- Schedule and conduct an exit interview to understand the reason for leaving and gain feedback
- Document the insights from the interview

☐ IT and Security

- Return of company-issued devices and property (e.g., laptop, ID card, mobile phone)
- Revoke access to company systems, software, emails, and databases
- Remove from company's internal communication channels (e.g., Slack, MS Teams)

☐ Documentation

- Complete termination paper and other required documentation
- Update the employee's status in HR databases and systems
- Provide any necessary documents such as experience letters, recommendation letters, etc.

☐ Post-departure

- Send an official departure email on the employee's last day
- Update company phone and email directories
- Give farewell to the employee, keep in touch for networking

Please Note: This checklist is a general guide for offboarding staff. Depending on jurisdiction, the requirements for offboarding may differ slightly. Always refer to your internal HR policies and procedures, and consult with a legal expert or HR professional if in doubt.

Assess risk. Take action. Practice preventative HR care.

You always have options in how to respond to HR mistakes you've uncovered. You'll need to decide for yourself what's practical, what's in your budget, and what's the right thing to do.

Fortunately, **HR for Health** will be there for you every step of the way to help you navigate these difficult waters. Our automated, cloud-based software will help you scale efficiently, so you can reclaim some precious time and money.

SCHEDULE HR RISK ASSESSMENT CALL

