

CHECKLIST | Offboarding: Involuntary Terminations

Presented by BeaconPath, Inc.

This checklist is intended to be used as a guide, so not all of the following steps are necessary to offboard an employee. The offboarding process may differ based on your organization's size and other factors; thus, the steps in this list should be modified to meet the unique needs of your organization. Due to the complexities of terminating an employee, including the many applicable federal, state and local laws, employers are encouraged to seek legal counsel to discuss and address specific issues and concerns. This checklist can be referenced by a supervisor, manager or HR representative to help ensure key steps are not missed for all involuntarily terminated employees.

Initial Steps	
Discuss the organization's decision to terminate the departing employee with relevant individuals—such as the leadership team and HR—and potentially with legal counsel to ensure the termination is warranted and complies with federal and state laws.	<input type="checkbox"/>
Document any performance issues, warnings, policy violations and disciplinary actions pertaining to the departing employee.	<input type="checkbox"/>
Notify all relevant individuals—such as the leadership team, HR and IT—that the offboarding process is starting for the departing employee.	<input type="checkbox"/>
Ask HR to prepare the departing employee's final paycheck and all necessary paperwork, including the termination letter, nondisclosure and noncompete agreements, explanation of benefits, COBRA notice and unemployment insurance, if applicable.	<input type="checkbox"/>
Create and document a transition plan for the departing employee.	<input type="checkbox"/>
Schedule a separation meeting with the departing employee.	<input type="checkbox"/>
Ask HR or another qualified individual to conduct a separation meeting with the departing employee and to document what is discussed during the meeting.	<input type="checkbox"/>
If necessary, decide which employees will assume the departing employee's responsibilities.	<input type="checkbox"/>
Create a list of all devices and equipment—including keys, badges, access cards, credit cards and uniforms—to collect from the departing employee.	<input type="checkbox"/>
Create a list of all systems, software, apps and files the departing employee can access.	<input type="checkbox"/>
Begin recruiting to fill the departing employee's position, if necessary.	<input type="checkbox"/>

This checklist is merely a guideline. It is neither meant to be exhaustive nor meant to be construed as legal advice. It does not address all potential compliance issues with federal, state or local standards. Consult your licensed representative at BeaconPath, Inc. or legal counsel to address possible compliance requirements. © 2022 Zywave, Inc. All rights reserved.

Separation Meeting	
Notify the departing employee of the organization’s decision to end their employment and consider explaining the reasons for the termination.	<input type="checkbox"/>
Provide the departing employee with information regarding any final payments, including paychecks, bonuses or severance payments, as well as any other exit documentation, if applicable.	<input type="checkbox"/>
If applicable, review when and how the departing employee’s group health benefits will end, and inform the departing employee that COBRA election paperwork has been or will be mailed to them.	<input type="checkbox"/>
Provide the departing employee with information about state unemployment benefits.	<input type="checkbox"/>
Notify the departing employee of any post-employment legal obligations—such as noncompetition and confidentiality agreements—if applicable.	<input type="checkbox"/>
Provide the departing employee with separation, severance, nondisclosure and noncompete agreements, if applicable.	<input type="checkbox"/>
Notify the departing employee that their access to all of the organization’s systems, software, apps and files will be revoked.	<input type="checkbox"/>
Ask the departing employee to return all work-related documents and other information.	<input type="checkbox"/>
Collect all company devices, equipment and passwords from the departing employee.	<input type="checkbox"/>
If the departing employee uses their personal devices for work, remove all files and access from their devices.	<input type="checkbox"/>
Ensure the departing employee provides their current contact information.	<input type="checkbox"/>
Have the individual conducting the separation meeting walk the departing employee from the organization’s premises. If necessary, escort the employee from the organization’s premises with security in alignment with the organization’s policies.	<input type="checkbox"/>

Following the Separation Meeting	
Notify the departing employee’s team, the wider organization and clients, if applicable, of the employee’s departure and last day.	<input type="checkbox"/>
Schedule a meeting with any employees assuming the departing employee’s responsibilities to transfer all necessary information and duties.	<input type="checkbox"/>
Provide vendors, clients and other employees with an updated point of contact for the departing employee’s responsibilities, if applicable.	<input type="checkbox"/>

Schedule meetings with the departing employee’s vendors, clients and others to transition to the organization’s new point of contact, if necessary.	<input type="checkbox"/>
Remove the departing employee’s access to all systems, software, apps and files. If the departing employee works remotely, terminate their VPN and remote desktop access, if applicable.	<input type="checkbox"/>
Retain and store records in compliance with the organization’s retention policies and any legal requirements, including any human resource information system or human capital management profiles, if applicable.	<input type="checkbox"/>
Reset all system, software, software, app and file access for the departing employee.	<input type="checkbox"/>
Deactivate the departing employee’s profiles on all systems, software and apps where appropriate.	<input type="checkbox"/>
Forward the departing employee’s emails, telephone calls, voicemails and any other communications to other employees assuming the departing employee’s responsibilities.	<input type="checkbox"/>

Final Steps	
Update the departing employee’s contact information.	<input type="checkbox"/>
Update all organizational charts.	<input type="checkbox"/>
Update the organization’s insurance provider of the employee’s departure, if applicable.	<input type="checkbox"/>
Process the departing employee’s final payments in a timely manner.	<input type="checkbox"/>
Discuss information gathered from the departing employee’s separation meeting with relevant individuals—such as the leadership team, HR, managers, supervisors and legal counsel—and determine any action items.	<input type="checkbox"/>
Clean the departing employee’s office or desk area and prepare it for another employee.	<input type="checkbox"/>

For more information about offboarding, contact BeaconPath, Inc. today: 888-883-1920.

