

CHECKLIST | Offboarding: Voluntary Terminations

Presented by BeaconPath, Inc.

This checklist outlines the steps for offboarding employees voluntarily departing your organization. This checklist is intended to be used as a guide, and 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. This checklist is to be completed by a supervisor, manager or HR representative to help ensure a smooth transition for all employees who voluntarily end their employment.

Initial Steps	
Thank the departing employee for their contributions to the organization.	<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 resignation or retirement letter, nondisclosure and noncompete agreements, explanation of benefits, COBRA notice, retirement plan transfer and unemployment insurance, if applicable.	<input type="checkbox"/>
Review the offboarding process with the departing employee, including timeline and expectations, and provide them with a copy of an offboarding checklist or communications detailing expectations.	<input type="checkbox"/>
Create and document a transition plan with the departing employee to ensure knowledge transfer is completed before the departing employee's last day.	<input type="checkbox"/>
Schedule an exit interview with the departing employee.	<input type="checkbox"/>
Ask HR or another neutral individual to conduct an exit interview with the departing employee and document all feedback.	<input type="checkbox"/>
Notify the departing employee's team, wider organization and clients, if applicable, of the employee's departure and last day.	<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.

Knowledge Transfer	
Ask the departing employee to document all necessary information to facilitate a knowledge transfer to other employees, including their roles and responsibilities, projects, deliverables, client or vendor contacts, and access to documents.	<input type="checkbox"/>
Ask the departing employee to return all work-related documents and other information.	<input type="checkbox"/>
If necessary, decide which employees will assume the departing employee's responsibilities.	<input type="checkbox"/>
Communicate to other employees any temporary reassigning of the departing employee's responsibilities.	<input type="checkbox"/>
Schedule a meeting with the departing employee and 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"/>

Devices and Access	
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"/>
Provide the departing employee with a date, time and location to return all devices and equipment. If the departing employee works remotely, arrange a date and time for a courier to collect the departing employee's devices and equipment.	<input type="checkbox"/>
Create a list of all systems, software, apps and files the departing employee can access.	<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"/>
Remove the departing employee's access to all systems, software, apps and files. If the departing employee works remotely, terminate the departing employee's 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"/>
If the departing employee used their personal devices for work, schedule a time to remove all files and access from the departing employee's devices.	<input type="checkbox"/>
Forward the departing employee's emails, telephone calls, voicemails and any other communications to other employees before the departing employee's last day.	<input type="checkbox"/>

Exit Interview

Conduct an exit interview with the departing employee and document all feedback.	<input type="checkbox"/>
Provide the departing employee with information regarding any final payments, including paychecks, bonuses or severance payments, as well as any reference letter and other exit documentation, if applicable.	<input type="checkbox"/>
Thank the departing employee for their contributions to the organization. If the departing employee is leaving on good terms, consider discussing options for rehire.	<input type="checkbox"/>
Have the individual conducting the exit interview 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"/>

Final Steps

Celebrate the departing employee with a farewell event, such as a lunch or happy hour, to express appreciation for their contributions and welcome their next chapter, if appropriate.	<input type="checkbox"/>
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"/>
Add the departing employee to the organization's recruiting system or alumni group.	<input type="checkbox"/>
Discuss information gathered from the departing employee's exit interview with relevant individuals—such as the leadership team, HR, managers and supervisors—and determine any action items.	<input type="checkbox"/>
Clean the departing employee's office or desk area and ready it for another employee.	<input type="checkbox"/>

For more information about offboarding, contact BeaconPath, Inc. today: 888-830-1920.

