

# Off-boarding checklist.

Say goodbye in the right way!

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# Why do I need an off-boarding checklist?

An employee off-boarding checklist includes all necessary tasks in order to complete as and when an employee leaves the company. This is an easy check-box exercise so that supervisors and the HR team can see at a glance which activities have been finished and which are still outstanding to complete.

Here is a **timeline to follow** when going through the off-boarding



## 1. Employee decides to leave/Employee is terminated

Informs the team leader of the resignation/Employee is terminated.

Informs HR and relevant departments of the decision with reason where necessary.

IT and Payroll notified of the decision.

## 2. Paperwork

Sign resignation letter  
Non-compete/disclosure agreement and other relevant documents.

Support employee with benefit documentation

Calculate pay, inform payroll to prepare final paycheck.  
Accept the resignation on behalf of the company.

## 3. Knowledge Transfer

List down tasks, steps, project handovers, process and document file locations and contact details of vendors etc.

Initiate job shadowing.  
Facilitate transfer and redistribute tasks and projects among other members.

Provide the team leader with a succession plan.

#### 4. Exit Interview



Provide feedback for improvement.



Schedule exit interview with HR.



Conduct the exit interview to facilitate honest feedback and use it for improvement.

#### 5. Recover company assets



List down the assets belonging to work, non physical assets such as passwords, files etc.



Facilitate handover to IT and taking over non-financial assets.



Provide a checklist for employees and team leaders and ensure this process is followed.

#### 6. Farewell



Say goodbye, collect contact details to keep in touch.



Plan team recognition and farewell.



Formulate official farewell and wishes from the leadership team where necessary.

#### 7. Stay connected



Remove employees from recurring meetings.



Deactivate or transfer employee accounts and records.



Here is an ultimate off-boarding checklist to make your process easier.

## The off-boarding checklist.

### Paperwork

- Resignation
- Employee Healthcare Benefits
- Non-Disclosure Agreement
- Non Competent Agreement
- Tax Documents
- Outstanding Reimbursements

### IT Permission & Access

- Update Passwords
- Revoke Employee Access
- Remove Employee from Payroll
- Update Employee Directory & Org Chart
- Update Company Website
- Redirect Calls & Emails

### Knowledge Transfer

- List of important Contacts
- Useful Resources
- Location of Files & Records
- Status of Ongoing Projects
- List of Outstanding Tasks

### Exit Interview

- Exit Interview Questionnaire
- Discussion post Questionnaire
- Data Analysis
- Retrieve Insights

### Recover Company Assets

- IT Equipment
- Mobile Phone/Sim
- ID Cards & Badges
- Parking Tags
- Uniforms
- Access Cards/Keys

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The off-boarding process can be time consuming to do everything manually. Setting up reminders and following up can take an ample amount of time. That is why we have smart HR friendly systems such as PeoplesHR which can automate your mundane manual tasks with alerts which can cut down your productive time especially in a process like off-boarding.



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