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Employee Offboarding Checklist

30 steps from notice day to day 30. tequipy.com

Employee name	[ ]
Role and team	[ ]
Work country and state	[ ]
Departure type	☐ Resignation ☐ Termination ☐ Layoff ☐ Contract end
Notice date	[ ]
Last day	[ ]
Coordinator	[ ]
Personal email for after the last day	[ ]
Devices issued (type and serial)	[ ]

Owner key. Owners: HR, Manager, Payroll and finance, Legal, IT, Employee. "Lead" is the one person who answers for the step. "Helps" names who supplies something.

Phase 1: Notice day (day 0 to 2)

#	Step	Lead	Helps	Deadline	Done
1	Confirm the resignation or decision in writing and record the last day	HR	Manager	Day 0	☐
2	Look up the final pay, benefit and notice rules for the employee's work state or country	HR	Payroll, Legal	Day 0; before the meeting for a termination	☐
3	Check the contract for notice period, garden leave, confidentiality and restrictive terms	Legal	HR	Day 1	☐
4	Send one leaver notice to the manager, IT and payroll: last day, country, coordinator	HR		Day 1	☐
5	Confirm the devices and accessories the employee holds, with serials	HR	IT	Day 1	☐
6	Collect a personal email and a current home address for after the last day	HR	Employee	Day 2	☐
7	Agree who tells the team and clients, and on which day	Manager	HR	Day 2	☐

Phase 2: Handover (first half of the notice period)

#	Step	Lead	Helps	Deadline	Done
8	Write the handover plan: open work, owners, documents	Manager	Employee	End of week 1	☐
9	Move client and vendor contacts to named owners	Manager		Before the last week	☐
10	Decide what happens to the person's files and mailbox, including any legal hold	Legal	Manager	End of week 1	☐
11	Send the return of company property letter with the pickup details	HR	IT	5 working days before the last day	☐
12	Check the legal final pay deadline and work out the amount: salary, unused leave, commission	Payroll	HR	As soon as the deadline is known; it can be the last day	☐
13	Book the exit interview and offer an online form as well	HR		Last week	☐

Phase 3: The last week

#	Step	Lead	Helps	Deadline	Done
14	Hold the exit interview and remind the person of NDA and confidentiality terms	HR		Last week	☐
15	Confirm the end date of each benefit and which continuation notices apply	HR	Payroll	Last week	☐

Not legal advice. Final pay, benefit and notice rules vary by state and country. Check the rules where the employee works.
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#	Step	Lead	Helps	Deadline	Done
16	Settle open expenses and stop the company card	Payroll	Manager	Last week	☐
17	Prepare leaver documents: final payslip, the country's tax form, reference policy	Payroll	HR	Last week	☐
18	Agree the hour access ends and confirm it with IT in writing	HR	IT	Last week	☐
19	Confirm the pickup slot with the employee	HR	Employee	2 days before the last day	☐

Phase 4: The last day

#	Step	Lead	Helps	Deadline	Done
20	Pay final wages where the local rule makes them due on the last day or at the termination meeting	Payroll	HR	Legal deadline	☐
21	Get IT's written confirmation that access ended at the agreed hour	HR	IT	Last day	☐
22	Collect badges, keys and cards	Manager		Last day	☐
23	Hand the device to the courier, or confirm the pickup date	Employee	HR	Last day	☐
24	Record the leaving date in payroll and the HR system	Payroll	HR	Last day	☐

Phase 5: After the last day (up to day 30)

#	Step	Lead	Helps	Deadline	Done
25	Pay final wages by the legal deadline, if not already paid in step 20	Payroll		Legal deadline	☐
26	Send benefit continuation notices where the law requires them	HR	Payroll	Legal deadline	☐
27	Send the tax form and final payslip to the personal email	Payroll		With final pay	☐
28	File IT's confirmation that the device arrived and was wiped	HR	IT	On receipt	☐
29	Agree the device's next step: store, redeploy or sell back	Payroll and finance	IT	On receipt	☐
30	Close the file: signed documents, dates, return record; keep it as long as your retention policy says	HR		Day 30	☐

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