

CHECKLIST

Employee Offboarding & Termination Checklist

Handle every departure consistently and compliantly — final pay, COBRA, access, and exit.

SPIRIT HR · RESOURCE CHECKLIST

Offboarding is where compliance mistakes get expensive. Handle every departure — voluntary or not — consistently and by the book.

Before the conversation

- ☐ Documentation is complete and consistent.
- ☐ Final pay calculated, including accrued PTO (payout rules vary by state).
- ☐ Sensitive terminations reviewed with HR or counsel.
- ☐ Logistics planned: timing, who's present, access cut-off.

Day of departure

- ☐ Conduct the conversation privately and respectfully.
- ☐ Collect equipment, keys, badges, and company cards.
- ☐ Disable system access, email, and building access.
- ☐ Provide final documents and next steps in writing.

Pay & benefits

- ☐ Issue the final paycheck within your state's required timeframe.
- ☐ Pay out unused PTO if required by state or policy.
- ☐ Send the **COBRA** notice and benefits-continuation info.
- ☐ Provide 401(k) rollover/distribution information.

Admin & wrap-up

- ☐ Update payroll, HRIS, and benefits (termination effective date).
- ☐ Respond to any unemployment claim promptly and accurately.
- ☐ Transition duties and knowledge to the team.
- ☐ Hold an exit interview and capture feedback.

Not sure where you stand?

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