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Employee Offboarding: a Step by Step Guide for People Managers

Believe it or not, an employee's final days at a company can be just as crucial as their first. That's why it is important to have an offboarding checklist to make the process as smooth as possible, and to ensure your data is protected. We've developed a step by step guide to use the day you receive two-week notice from an employee on your team.

Before the employee's last day:

☐ Forward the employee's letter of resignation to your Human Resources/People Business Partner – within 24 hours of receiving.

☐ Notify your Human Resources/Talent Acquisition Business Partner to open a new job requisition (if backfilling the role).

☐ Develop a transition plan and make arrangements with the employee and to hand off active projects and other duties. Train necessary people who will be absorbing any job functions from the departing employee.

☐ Gather and organize business pertinent information from employee (including email, documents on your hard drive(s), external sites, etc.).

☐ If the departing employee is a system admin, application owner or a vendor relationship owner, you may be responsible for and expected to obtain and manage login credentials for the tool/relationship and transition ownership prior to person's departure.

☐ Create list of all systems, applications, tools and resources (online or physical - i.e. file cabinets, server rooms, keys) that the employee has access to. Add this information to the employee offboarding ticket so that proper access removal takes place.

☐ For hourly employees, be sure to approve time cards (and ensure they are up to date) prior to the employee's last day.

☐ Review any upcoming travel plans (hotels/flights/etc.) and make cancellations if applicable. Remind the employee to submit any outstanding expenses before last day.

☐ If applicable, reassign employee's direct reportsand distribute new reporting structure to relevant stakeholders.

☐ Let employee know that system access will be removed at a designated time on their last day.

☐ Review your departing employee offboarding workflow to ensure nothing was missed.

On the employee's last day:

- ☐ Ensure all systems access is revoked by the designated time indicated.

- ☐ Collect any company property from the employee such as their badge, computer, keys, IT equipment, or any other property.

  - – Return computer and IT related items to your IT department

  - – Return badge and other related items to your Facilities or Physical Security department

- ☐ Escort employee out of the building

- ☐ As the final step in your offboarding workflow, Inform relevant stakeholders that the employee has been escorted out of the building, all company property has been returned and all systems access has been revoked.

  If you haven't already, make sure you've added the list of all systems, applications, tools, and resources (online or physical - i.e. file cabinets, server rooms, keys) that the employee had access to.