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# Employee Offboarding Checklist



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Employees leave organizations for a variety of reasons - a new job, retirement, or layoffs to name a few. Regardless of the reason, as an employer, it is your job to help ensure their exit is as streamlined as possible for both you and them. Below, you will find a checklist to help guide you through the separation process for an employee. Keep in mind that every organization is different and you will find items to add or remove to make the offboarding experience work better for both you and your employee.

## Human Resource's Responsibilities

- ☐ Request a written and signed resignation letter if the employee is resigning.
- ☐ Provide the employee with a timeline of what will happen (returning company assets, exit interview, etc.).
- ☐ Conduct an exit interview to learn how your organization can improve the employee experience.
- ☐ Contact IT to close all employee accounts and change passwords.
- ☐ Confirm when and where company equipment is received.
- ☐ Remove any security access to buildings.
- ☐ Prepare the final paycheck according to state requirements and confirm that the final wages will be ready for the employee, as applicable by state law.
- ☐ Contact insurance carriers to inform them about the benefit terminations.
- ☐ Contact your COBRA administrator, if applicable.
- ☐ Update your company's internal HRIS system, if applicable.
- ☐ Complete the termination in your system of record in accordance with how personnel and confidential files are handled.
- ☐ Prepare and present the appropriate separation forms.

### Potential Separation Forms

- Termination letter
- Severance agreement and/or release of claims
- Required state-specific separation forms, if applicable based on location
- Logistical information for returning company-owned equipment
- Consent to receive an electronic W-2
- Benefits information and expectations for COBRA
- Last paycheck information
- A copy of their non-compete and/or non-disclosure agreement
- Retirement, equity, and employee stock information
- Exit interview questions
- Contact information for questions
- Any additional FAQs

The [Offboarding Forms Solution](#) from Equifax Workforce Solutions can help you better manage separation notices required by states, along with allowing you to add your own offboarding forms to create one more user-friendly digital packet.

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## Direct Manager's Responsibilities

- ☐ Identify key stakeholders within your organization including managers and key team members that should be aware of the employee's departure.
- ☐ Notify clients, vendors, or any external contacts with which your employee had regular communication.
- ☐ Transition work and responsibilities to prevent gaps in knowledge.
- ☐ Gain access to files including redirecting any email accounts.
- ☐ Update any immediate work schedules to help prevent gaps in coverage.
- ☐ Coordinate with the employee the return of any company property including a laptop, cell phone, and security badge.

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