Employee Offboarding Checklist

Checklist · 117 items · 10 sections

A practical offboarding checklist for HR and IT managers, covering voluntary and involuntary separations. Built from SHRM, NIST SP 800-53 access control, HIPAA Security Rule, SOC 2 CC6.2, and GDPR Article 17. IT access revocation, equipment return, knowledge transfer, legal/payroll, exit interview, and the 30/60/90-day post-departure audit.

Open the editable version online:
https://genechecklist.com/checklist/offboarding-checklist

DECISION AND NOTICE (DAY 0)

- [ ] Receive resignation letter in writing for voluntary departures; save to personnel file (Workday, BambooHR)
  HIGH
- [ ] Document termination decision with performance history, PIP records, witness statements for involuntary departures
  HIGH
- [ ] Route involuntary termination decisions through Legal and HRBP before notifying employee
  HIGH
- [ ] Set last day of employment, final paycheck date, and benefits termination date in the HRIS
  HIGH
- [ ] Decide between garden leave, immediate exit, or standard transition period based on role sensitivity
  HIGH
- [ ] Notify direct manager, HRBP, IT/Security lead, Payroll within 1 business hour of the decision
  HIGH
- [ ] Lock down internal communication channels; do not announce in Slack/all-hands until employee is informed
  HIGH
- [ ] Schedule the notification meeting with 2 attendees (manager + HR) for involuntary terminations
  HIGH
- [ ] Prepare separation packet: final pay schedule, COBRA notice, 401(k) options, equity exercise terms, reference policy
  HIGH
- [ ] Create the offboarding ticket in Jira Service Management or ServiceNow; assign IT, HR, Facilities, Finance subtasks

IT AND SECURITY ACCESS REVOCATION

- [ ] Disable SSO in Okta, Google Workspace, Microsoft Entra ID, or JumpCloud at the agreed cutoff time on the last day
  HIGH
- [ ] Revoke admin/root accounts in AWS IAM, GCP IAM, Azure RBAC, Cloudflare; rotate any IAM access keys the employee created
  HIGH
- [ ] Remove user from GitHub, GitLab, Bitbucket; revoke personal access tokens, SSH keys, deploy keys
  HIGH
- [ ] Audit recent GitHub commits, force-pushes, and clones for IP exfiltration risk before revocation
  HIGH
- [ ] Disable VPN access in Tailscale, Cisco AnyConnect, or Palo Alto GlobalProtect
  HIGH
- [ ] Collect YubiKeys, RSA tokens, hardware MFA devices; deregister from the IdP
  HIGH
- [ ] Reset MFA enrollments; revoke active session tokens across all critical systems
  HIGH
- [ ] Set email auto-forward to manager for 30 days, then archive mailbox per retention policy
  HIGH
- [ ] Set an out-of-office auto-reply on the departing mailbox before disabling sign-in
- [ ] Deactivate Slack and Microsoft Teams; transfer ownership of private channels, workflows, bots to manager
  HIGH
- [ ] Revoke access in Salesforce, HubSpot, Zendesk, Intercom, Asana, Linear, Jira, Notion, Confluence, Figma, Airtable, Monday
  HIGH
- [ ] Decommission service accounts, cron jobs, CI/CD runners, webhooks owned by the departing employee; reassign ownership
  HIGH
- [ ] Rotate all shared credentials the employee accessed in 1Password, Bitwarden, LastPass, Doppler
  HIGH
- [ ] Remove employee from team vaults in 1Password/Bitwarden; revoke their emergency kit
  HIGH
- [ ] Rotate API keys, database credentials, signing certificates the employee had access to
  HIGH

- [ ] Revoke access to Stripe, QuickBooks, NetSuite, Brex, Ramp, and any financial systems
  HIGH
- [ ] Disable access to data warehouses (Snowflake, BigQuery, Redshift) and BI tools (Looker, Tableau, Mode)
  HIGH
- [ ] Remove from PagerDuty, Opsgenie, and on-call rotations
- [ ] Wipe and re-image company laptop using Jamf, Kandji, Intune, or Workspace ONE before reissuing
  HIGH
- [ ] Trigger remote lock and wipe through MDM if device not returned by deadline
  HIGH
- [ ] Revoke MDM profiles; remove company data from BYOD phones
  HIGH
- [ ] Disable badge access, parking access, door codes in physical access system (Kisi, Brivo, Genea)
  HIGH
- [ ] Remove from visitor management systems (Envoy, SwipedOn)
- [ ] Verify access revocation by reviewing audit logs in Okta, Google Workspace, and SIEM 24 hours after last day
  HIGH

EQUIPMENT RETURN

- [ ] Generate a return inventory list from IT asset management (Jamf, Asset Panda, Snipe-IT)
  HIGH
- [ ] Collect laptop, charger, monitor, keyboard, mouse, webcam, dock, headset
  HIGH
- [ ] Collect company-issued phone and SIM card; transfer the number to employee personally if requested and approved
  HIGH
- [ ] Collect YubiKeys, RSA tokens, hardware authenticators
  HIGH
- [ ] Collect office badge, parking pass, garage remote, physical keys
  HIGH
- [ ] Collect company credit card (Brex, Ramp, Amex); process the final expense report
  HIGH
- [ ] Collect office and mailbox keys
- [ ] Collect role-specific equipment: cameras, podcast gear, demo hardware, prototypes

- [ ] Ship a prepaid return kit with tracking and insurance for remote employees
  HIGH
- [ ] Inspect returned equipment for damage; log condition in the asset management system
- [ ] Update asset records: returned, in repair, or written off

KNOWLEDGE TRANSFER

- [ ] Have the departing employee write a transition document covering responsibilities, recurring tasks, SOPs
  HIGH
- [ ] Document active projects, status, blockers, decisions in progress in Notion or Confluence
  HIGH
- [ ] List external vendor contacts, account managers, contract renewal dates, login locations
  HIGH
- [ ] Transfer ownership of Google Drive folders, Notion pages, Confluence spaces, SharePoint sites to manager
  HIGH
- [ ] Reassign open Jira/Linear/Asana/GitHub tickets to manager or successor
  HIGH
- [ ] Transfer ownership of recurring calendar events and shared calendars in Google Calendar or Outlook
- [ ] Cancel or reassign 1:1 meetings the departing employee hosted
- [ ] Introduce the successor to key internal stakeholders, customers, vendors via email
  HIGH
- [ ] Hand off customer relationships in Salesforce/HubSpot; reassign account ownership; update activity history
  HIGH
- [ ] Record screen walkthroughs of complex systems, dashboards, or undocumented processes using Loom
- [ ] Identify undocumented institutional knowledge; capture it before the last day
  HIGH
- [ ] Schedule shadowing sessions between the departing employee and successor or interim owner

HR AND COMPLIANCE

- [ ] Schedule exit interview with HR (not direct manager) 1-3 days before last day
  HIGH
- [ ] Document exit interview themes; feed insights into retention analytics

- [ ] Issue final paycheck per state law (same day in CA; within 72 hrs in many states; next regular payday in others)
  HIGH
- [ ] Calculate and pay out unused PTO per company policy and state law (mandatory in CA, CO, others)
  HIGH
- [ ] Send the 401(k) distribution options letter (Fidelity, Vanguard, Empower, Guideline)
  HIGH
- [ ] Issue COBRA election notice within 14 days of the qualifying event per federal law
  HIGH
- [ ] Confirm W-2 mailing address and personal email for next January's tax forms
  HIGH
- [ ] Clarify reference policy: name, dates of employment, title only, unless employee signs a release
- [ ] Remind in writing of NDA, non-compete, non-solicitation, IP assignment obligations
  HIGH
- [ ] Communicate the equity exercise window: 90 days for ISOs by default, or extended per the stock plan
  HIGH
- [ ] Distinguish ISO vs NSO treatment in the equity termination notice; recommend tax counsel
- [ ] Recover signing bonus clawbacks, tuition reimbursement, or relocation costs per agreement
- [ ] Recover company property advances, employee loans, outstanding expense reports from final paycheck where state law permits

PAYROLL AND BENEFITS

- [ ] Calculate final paycheck: regular wages + unused PTO + approved expenses + earned commission/bonus
  HIGH
- [ ] Set healthcare coverage end date (last day or end of month per plan terms)
  HIGH
- [ ] Send COBRA enrollment instructions and premium amounts from the COBRA administrator
  HIGH
- [ ] Confirm 401(k) vesting status; send rollover instructions
  HIGH
- [ ] Notify the employee of equity exercise deadline; net-exercise or cashless options if available
  HIGH
- [ ] Forfeit unused FSA balances per IRS use-it-or-lose-it rules; reimburse eligible claims before termination date

- [ ] Confirm HSA portability; employee keeps the account and balance
- [ ] Collect outstanding employee loans, salary advances, equipment fees from final paycheck per state law
- [ ] Terminate commuter benefits, dependent care FSA, life insurance coverage
- [ ] Notify the disability insurance carrier; update group plan census

LEGAL AND REGULATORY

- [ ] Present separation agreement and release for severance recipients; allow legally required review periods (21 or 45 days under OWBPA for 40+)

  HIGH
- [ ] Honor the 7-day ADEA revocation period before paying severance

  HIGH
- [ ] Outline severance terms: lump sum vs salary continuation, benefits continuation, outplacement services

  HIGH
- [ ] Reconfirm IP assignment, confidentiality, trade secret obligations

  HIGH
- [ ] Issue written non-compete and non-solicitation reminder citing the relevant agreement

  HIGH
- [ ] For involuntary terminations: finalize documented performance file; route through Legal for review

  HIGH
- [ ] Comply with federal WARN Act for layoffs of 50+ at one site; check state mini-WARN thresholds (NY, CA, NJ)

  HIGH
- [ ] Report separation reason to the state unemployment insurance agency

  HIGH
- [ ] Notify regulators for licensed roles (FINRA Form U5 within 30 days for securities; medical board for clinicians)

  HIGH
- [ ] Document SOC 2 access revocation evidence in the GRC platform (Vanta, Drata, Secureframe)
- [ ] Execute GDPR Article 17 deletion of personal data where required, balanced against retention obligations
- [ ] Preserve litigation hold data if the employee is involved in active or anticipated legal matters

  HIGH

COMMUNICATION

- [ ] Time the internal announcement: same day for voluntary, after exit for involuntary
- [ ] Send team email or Slack post acknowledging the departure with the agreed message
- [ ] Update the org chart in Workday, BambooHR, or Lattice
- [ ] Update email signature blocks, on-call rotations, customer-facing email aliases
- [ ] Update website team pages; remove from public bios
- [ ] Leave LinkedIn updates to the employee; do not force a change to their public profile
- [ ] Plan a send-off (lunch, card, gift) for amicable voluntary departures
- [ ] Update vendor and customer points of contact in CRM and procurement records

DAY-OF EXIT

- [ ] Hold the final manager 1:1; capture any last-minute knowledge gaps
  HIGH
- [ ] Walk through desk, locker, parking spot; collect personal items separately from company property
- [ ] Collect badge, equipment, keys, credit cards at the exit meeting
  HIGH
- [ ] Verify in real time that SSO, VPN, email, Slack, and critical SaaS access are disabled
  HIGH
- [ ] Escort the employee out for involuntary terminations or sensitive voluntary exits; coordinate with Security
  HIGH
- [ ] Confirm forwarding address for final paycheck and W-2
  HIGH
- [ ] Provide a printed copy of separation packet, COBRA notice, 401(k) options
  HIGH
- [ ] Document exit time and acknowledgment of property return on the offboarding checklist

POST-DEPARTURE (30/60/90 DAYS)

- [ ] Run an access audit 24 hours, 7 days, 30 days after last day across IdP, cloud accounts, SaaS tools
  HIGH
- [ ] Monitor SIEM and CASB alerts for anomalous sign-in attempts using former employee's credentials/device fingerprints
  HIGH

- [ ] Disable email forwarding; archive the mailbox after the 30-day window; retain per legal hold or retention policy

  HIGH

- [ ] Mail W-2 by January 31 of the following year to the confirmed address

  HIGH

- [ ] Retain personnel file for 7 years (or longer per state/federal: I-9 3 yrs post-separation, payroll 3-4 yrs, OSHA 5 yrs)

  HIGH

- [ ] Update org chart, reporting lines, approval workflows in HRIS and finance systems
- [ ] Conduct a 60-day knowledge transfer retro with successor or manager to surface gaps
- [ ] Close the offboarding ticket only after IT, HR, Facilities, Finance, and Legal subtasks are confirmed complete

  HIGH

- [ ] Refresh the offboarding playbook quarterly based on lessons learned and changes in SaaS stack, regulations, state law