

HR Offboarding Process Master Checklist

This document serves as the master checklist for managing the offboarding process of departing employees. Please complete all fields and sign off on each task.

Employee Information

Employee Name: Job Title:
Department: Manager Name:
Departure Date: Reason for Departure:

Phase 1: Resignation & Administration

Task Description	Completed Date (MM/DD/YYYY)	Completed By (Initials)
Receive and file formal written resignation letter	<input type="text"/>	<input type="text"/>
Send written acknowledgment of resignation to employee	<input type="text"/>	<input type="text"/>
Notify HR payroll team and update HRIS system status	<input type="text"/>	<input type="text"/>
Notify IT, Facilities, and Department Manager of departure	<input type="text"/>	<input type="text"/>

Phase 2: Assets & Property Retrieval

Asset Description	Date Returned (MM/DD/YYYY)	Received By (Initials)
Company Laptop and charger	<input type="text"/>	<input type="text"/>
Company mobile phone and accessories	<input type="text"/>	<input type="text"/>
Office security keys, building access pass, and parking permit	<input type="text"/>	<input type="text"/>
Company credit cards / purchasing cards	<input type="text"/>	<input type="text"/>

Phase 3: System Access Revocation

System/ Account	Revocation Date (MM/DD/YYYY)	Confirmed By (Initials)
Corporate Email account (deactivate or set forwarding)	<input type="text"/>	<input type="text"/>
VPN and Internal Network access	<input type="text"/>	<input type="text"/>
SaaS Subscriptions (Slack, Salesforce, GitHub, etc.)	<input type="text"/>	<input type="text"/>
Remove from company website directory and email distribution lists	<input type="text"/>	<input type="text"/>

Phase 4: Financials & Benefits

Action Item	Processing Date (MM/DD/YYYY)	Authorized By (Initials)
Calculate final payout (unused accrued PTO, regular hours worked)	<input type="text"/>	<input type="text"/>
Process outstanding business expense reports	<input type="text"/>	<input type="text"/>
Provide COBRA health insurance continuation documentation	<input type="text"/>	<input type="text"/>
Send 401(k) / retirement plan distribution information	<input type="text"/>	<input type="text"/>

Phase 5: Knowledge Transfer & Exit

Step	Date (MM/DD/YYYY)	Notes / Verification

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Conduct exit interview		
Complete handover of ongoing projects and files		
Obtain forwarding address and personal contact details		

Sign-off & Approvals

HR Representative Signature: Date:

Department Manager Signature: Date: