# Offboarding Checklist

## Paperwork

* Arrangements and date for last paycheck
* Post-employment payment (severance, unemployment)
* 401 (k) information
* Health insurance information
* Non-disclosure and non-compete agreements
* Tax documents (W2, 1099-Misc)
* Other Benefits (PTO or vacation balances, options)
* Official Letter of Resignation (if applicable)
* Outstanding Reimbursements

## Knowledge Transfer

If you have a replacement hired, make sure they’re aware of the following

information. If not, have the departing employee document all of these:

* Technology necessary to do the job (computers, files, special systems)
* Special knowledge sources (binders, folders, formal protocols)
* Necessary contacts and relationships
* Location of Records (accounting documents, etc.)
* Useful resources (websites, newsletters, networking venues)
* Tasks in process or uncompleted
* Status report on all ongoing projects (due dates, deliverables)
* Consider having a current employee shadow the departing employee

## Exit Interview

This is an opportunity to learn more about your company. Questions you

might ask include:

* What did you like most and least about your job?
* Were goals and expectations clear to you?
* Do you think the job description matches these expectations? Would you change it?
* Talk about your manager(s). What did they do well? What could they use work on? What are some recommendations you might give them (anonymously, of course) that could help them improve?
* Did you receive enough feedback on your job? Did it help?
* Did you have all the resources necessary to do your job? If not, what else might have helped?
* Did you feel you had room to grow here?
* Would you work here again?
* Would you recommend this company or this position to a friend? Why or why not?

## Recover Assets

* Laptop
* Cell phone
* ID Card
* Badge
* Credit Cards
* Parking Tags
* Keys

## Final Housekeeping:

* Update passwords
* Remove employee’s online account
* Remove employee from payroll
* Update company directory
* Update org chart
* Change company website if employee’s name is mentioned on it
* Redirect phone calls