

## TEMPLATE

# Employee Offboarding Checklist

A clean, consistent, legally careful process for employee departures

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*Use the same process for every departure, voluntary or involuntary. Consistency is your protection. Confirm state-specific final-pay timing.*

## Departure details

Employee name: \_\_\_\_\_

Last day: \_\_\_\_\_

Reason (voluntary / involuntary): \_\_\_\_\_

## Before the last day

- Confirm the departure reason and document it factually
- Determine final-pay deadline for your state (often strict, sometimes same-day)
- Calculate final pay including any required PTO payout
- Prepare required separation notices (vary by state)
- Plan the communication to the team
- For involuntary exits: confirm documentation supports the decision and the process was consistent

## On the last day

- Conduct the separation conversation (keep it factual and brief)
- Deliver final pay on the state-required timeline
- Provide benefits continuation information (COBRA where applicable)
- Collect all company property: laptop, devices, keys, cards, documents
- Revoke access to systems, email, and data promptly
- Provide any required separation and unemployment notices

## After departure

- Remove from payroll and benefits systems
- Retain the personnel file for the legally required period
- Update org charts, directories, and vendor access
- Redirect email and reassign responsibilities
- Conduct or document an exit interview, if used

For involuntary terminations, the two things that protect you are documentation and consistency: a factual record supporting the decision, and a process that matches how you have handled similar situations before.

## Exit interview prompts (optional)

- What worked well in this role and what did not?
- What would have made you stay?
- How was onboarding, management, and communication?
- Any feedback on the team or company?