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Offboarding Checklist

Ensuring a smooth offboarding process



Offboarding Checklist

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A clear and consistent offboarding process helps ensure an employee's departure is managed professionally and that all outstanding matters are addressed.

It provides an opportunity to confirm the employee's leaving arrangements, gather feedback through an exit interview, calculate final pay and outstanding annual leave, and arrange the return of company property.

It is also important to protect company information, update access permissions, and ensure relevant employment records are completed, updated and retained appropriately.

This checklist provides guidance on the key areas to cover as part of an employee offboarding process



Resignation and Leaving Arrangements

- [ ] Written confirmation of resignation received and retained on file
- [ ] Resignation date and notice period confirmed, as per contract
- [ ] Confirmation of termination date
- [ ] Any request to work a reduced notice period, take annual leave during notice, or leave early agreed and documented.
- [ ] Employee informed of any handover requirements and key tasks to complete before leaving
- [ ] Relevant manager and departments notified of the departure on a need-to-know basis
- [ ] Where the employer is ending employment, the appropriate process and documentation have been followed

Minimum Notice Periods

Length of Continuous Service	Statutory Minimum Notice
13 weeks to - 2 years	1 week
2 years to - 5 years	2 weeks
5 years to - 10 years	4 weeks
10 years to - 15 years	6 weeks
15 years or more	8 weeks

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Exit Interview

- [ ] Arrange exit interview prior to employee leaviing
- [ ] Document exit interview and store on employee file
  - [ ] Feedback gathered on the employee's experience, role, management, training and workplace culture.
  - [ ] Any concerns raised recorded objectively and handled appropriately
  - [ ] Action any queries/ issues that require follow up

Final Pay and Entitlements

- [ ] Confirm final pay date with the employee
- [ ] Review annual leave balance to confirm accrued but untaken annual leave
- [ ] Advise payroll if there is any accrued outstanding annual leave to be paid in final pay
  - [ ] Any annual leave taken during the notice period accounted for correctly
- [ ] Outstanding wages, overtime, commission, bonus or expenses reviewed and processed where applicable
- [ ] Where an employee has used in excess of annual leave accrued, deductons to be made from final pay, where contract allows.
  - [ ] ensure employee signs off on the deduction from their final pay
- [ ] Final payslip and any relevant payroll information issued through the usual process
- [ ] Advise employee on who to contact with any final pay queries.

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Company Property and Access

- [ ] Return of company property arranged and confirmed
- [ ] Company keys, access cards, passes and alarm codes returned or disabled
- [ ] IT access, email, systems, apps and remote access scheduled to be removed or amended at the appropriate time
- [ ] Company files, documents and information returned or transferred to the relevant manager
- [ ] Relevant manager and departments notified of the departure on a need-to-know basis
- [ ] Where the employer is ending employment, the appropriate process and documentation have been followed



Laptop



Tablet



Desktop Computer



Mobile



Sim Card



Credit card/ Fuel card



Keys



Fob/ Access card



Uniform



Personal Protective Equipment



Tools/ Equipment/ Specialist devices



Company vehicle



Company files



Storage devices



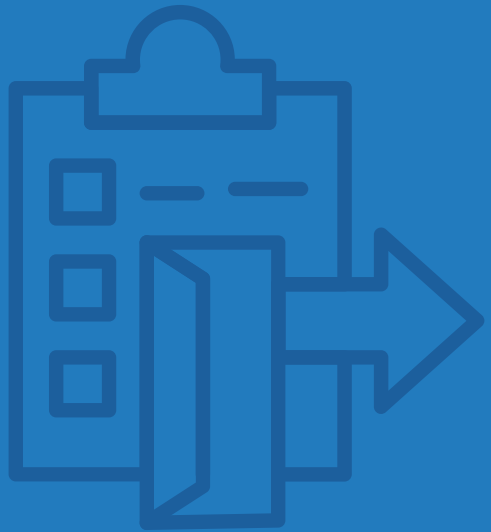
IT Equipment

Records

- [ ] Employee's personnel file updated with resignation and leaving correspondence
- [ ] Relevant records updated, including organisation charts, staff lists, emergency contacts and access levels
- [ ] Handover completed and key files, contacts, deadlines and ongoing tasks transferred
- [ ] Company directory, website, email distribution lists and other relevant listings updated
- [ ] Any company-specific declarations, acknowledgements or exit documentation completed and retained
- [ ] Records stored securely and retained in line with the company's retention schedule and data protection requirements

Final Checks

- [ ] Employee reminded of any continuing obligations, where relevant, such as confidentiality, intellectual property or return of company information.
- [ ] Written reference provided, where agreed and company policy allows
- [ ] Employee provided with a point of contact for queries after leaving
- [ ] All outstanding actions assigned to a named person with a completion date



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HR Reminder

- ✓ Written confirmation of resignation recieved and stored
- ✓ Check final pay and outstanding annual leave before payroll is processed
- ✓ Arrange the return of company property and removal of access.
- ✓ Update employee records and retain documentation securely

MSS Tip

While exit interviews are not mandatory, they provide a valuable opportunity to gather feedback on the employee's experience, identify areas for improvement and highlight any issues that may help the company improve employee retention and workplace practices.



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