Off-boarding Checklist

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One of the reasons employee terminations can feel difficult to manage is that the process has so many steps to keep track of. From putting together a severance package to collecting property, an employee termination requires a lot of work and attention to detail from employers and managers.

Documentation

- ⭕ Finalize last day, termination pay
- ⭕ Calculate vacation time owed
- ⭕ Calculate any expenses that need to be paid
- ⭕ Provide termination letter
- ⭕ Reference letter if applicable
- ⭕ Any resources such out outplacement support to be introduced

Payroll

- ⭕ Final Pay calculated correctly
- ⭕ Termination and severance are included
- ⭕ Vacation is included
- ⭕ Expenses are paid
- ⭕ ROE scheduled to be filed

Access

- ⭕ Make sure employee's e-mail is not accessible
- ⭕ Set up an auto generated message
- ⭕ Forward emails to successor or supervisor
- ⭕ Remove access to social media
- ⭕ IG, LinkedIn, Facebook, etc
- ⭕ Remove access from employee files
- ⭕ Remove access from vendors/clients
- ⭕ Disable phone line or change password
- ⭕ Disable system access (CRM, Finance, Dropbox, Slack, WhatsApp, etc)
- ⭕ Remove from internal chat groups

Property

- ⭕ Create a list of all employer owned property
- ⭕ Treat passwords as company property
- ⭕ Send a memo with the list of property to be returned
- ⭕ Email pre-paid waybill to ship items back
- ⭕ Once received, check the items for damage

Last steps

- ⭕ Have a meeting with the team
- ⭕ Disperse the work to the team
- ⭕ Reach out to clients who have frequent contract with the employee
- ⭕ Remind of contractual obligations

A good offboarding experience is important not only for departing employees but also for the organization as a whole. It helps maintain a positive employer brand, ensures legal compliance, and supports a smooth transition for both departing and remaining employees.

Don't forget there are specific paperwork pertaining employments that needs to be filed as well. Remember that there is also employment-related paperwork that must also be filed and completed. If you're unsure about what is required, don't hesitate to get in touch.