**Offboarding Checklist**

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| --- | --- | --- | --- |
| **Employee Name:**  |   |  |  |
| **Position:**  |   |  |  |
| **Final day worked:** |   |  |  |
|  |  |  |  |
|  | **REQUIRED ACTION** | **Who is responsible** | **Date Completed** |
| **COMMUNICATION****Hearing the news from you and not the grapevine will help to build trust & transparency, and reduce gossip.**  | **Thank the employee for their service.**  *Former employees can be ambassadors, customers and will likely remain friends with current employees. How you treat them matters.*  |   |  |
| **Internal Departmental Communications:** *Some departments need to be notified immediately to begin their roles in the offboarding process, such as IT, HR, & Payroll.* |  |  |
|  | **Internal staff communications:** *Let your staff know they will be moving on (or have moved on) and who will be taking over their responsibilities going forward* |  |  |
|  | **External Communications:** *If the employees role interacted with external stakeholders, communicate the departure along with who will be their new contact person.* |  |  |
| **KNOWLEDGE TRANSFER** | A clear overview of the daily tasks they perform, especially critical & high priority tasks |  |  |
| **CRITICAL for business continuity** | Location & Access rights to all systems, programs and files they use |  |  |
|  | A list of people they work with, both inside & outside the organization.  |  |  |
|  | Provide relevant training to staff who are absorbing new responsibilities |  |  |
|  | Ensure their emails, phone & voice mails are being monitored past their departure. |   |  |
| **EXIT INTERVIEW** | Make sure that you learn something from the offboarding process. What should you stop doing, keep doing or start doing to make the employee experience better?You can refer to the [Exit Interview template](https://www.go2hr.ca/wp-content/uploads/2023/04/Exit-Interview-Template.docx) on the go2HR website. |  |  |
| **RECOVER COMPANY PROPERTY** | This will vary across companies and roles, but typically can include:* Keys, FOBS & lanyards
* Laptop, monitors & computer accessories
* Home office equipment, if supplied by company
* Cell phone
* Gas or Credit cards
* Uniform &Name tags
 |   |  |
| **SYSTEM ACCESS** | * Disable user logins
* Change relevant passwords to shared internal & external systems
 |  |  |
| **COMPLETE FINAL PAY**  | * Collect final time sheets or other applicable documentation
* Calculate vacation allotment & payout
* Final bonuses/commissions/tips
* Complete within allotted timeframe.

Saskatchewan Employment standards require the following timeframes for final pay to be issued:* Requires that all employees to be paid all monies in full within 14 days
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|  | * [Complete ROE & T4](https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/payroll/payroll-overview/life-events-employees/what-should-you-employee-leaves.html)
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| **REMOVE FROM INTERNAL SYSTEMS** | * Removal from Payroll system after final pay
* Removal from group benefits
* Removal from internal org charts, company directory, phone directory, website…
* Redirect emails & phone numbers
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