**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 |  |  |
|  | * [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) |  |  |
| **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 |  |  |