The Offboarding Steps Every HR Manager Should Follow

Use this offboarding checklist to streamline the employee exit process to create a positive, lasting impression and automate your HR processes.

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Employee Offboarding Checklist

A complete offboarding checklist can ensure that anyone can provide the best employee exit process for their organization, even if you aren't in HR. Follow the 13 key steps below, and you'll gracefully move your employee through the last stage of the employee life cycle. You will be able to offboard your employee smoothly and use your time efficiently while your organization remains undisrupted.

- ❏ *Ask for an official letter of resignation. This can be a written letter or an email from the employee, but make sure to keep a copy on file.*
- ❏ *Complete the termination letter. Platforms like GoCo allow you to easily generate a personalized letter from a template*
- ❏ *Ensure they have a copy of any relevant policies (e.g., non-disclosures or non-competes) You can track these documents through an HRIS platform like GoCo.*
- ❏ *Create an internal communications plan. Determine a communication plan for delivering the news to their team, department, or the organization.*
- ❏ *Create an external communications plan. Remember to remove the employee from the company directory, website, or any other external communications.*
- ❏ *Schedule an exit interview. This is your opportunity to learn about why the employee is leaving, which may be a valuable source of information to help prevent losing future talent.*

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- ❑ **Create a transition plan.** *Who will cover their work until you have the opportunity to hire and train someone new? You'll need to evaluate the urgent and important work.*
- ❑ **Plan to hire their backfill.** *As part of the offboarding process, get the employee's opinion on what may be needed.*
- ❑ **Let them know what will happen to their healthcare and retirement programs.** Provide them with the necessary login information and documentation of their options so they can make informed decisions.
- ❑ **Update their personal information for future documents.** *They may not be your employee anymore, but you are still responsible for providing them with tax documents at the end of the tax year. You can utilize a self-service option, such as* GoCo*, to automate this process.*
- ❑ **Make arrangements for their final paycheck.** *You'll need to include any clawbacks (e.g., borrowed vacation, courses the company paid for with an agreement), and payouts (e.g., banked vacation). You can track their vacations through GoCo, which allows you to track your team's time-off requests, balances, and approvals—all without spreadsheets.*
- ❑ **Collect any company-owned equipment.** *Instead of tracking these items on a spreadsheet, you can utilize an HRMS like* GoCo*.*
- ❑ **Remove their access to any organizational systems.** *Disable their email and remove their access to any systems that they may have used to do their job, such as Sharepoint or Google Drive.*

That's all there is to it! Follow these 13 steps, and you'll move through the offboarding process seamlessly. Automate the paperwork steps through an HRMS platform such as GoCo to avoid wasting your time on administrative tasks like printing documents and chasing signatures. All of this will guarantee a positive last experience and a smooth transition.

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