Employee Offboarding Checklist

Document ID: HR-OO-010 **Last Updated:** March 2024 **Owner:** Human Resources **Applies To:** All Departing Employees

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Overview

This checklist ensures a smooth transition when an employee leaves NovaTech. It covers responsibilities for the departing employee, their manager, HR, and IT.

Voluntary Departure

Notice Period

Role Level	Notice Period
Individual Contributor	2 weeks
Manager/Senior IC	3 weeks
Director+	4 weeks

Notice may be negotiated based on business needs and knowledge transfer requirements.

Manager Checklist

Within 24 Hours of Resignation

- ☐ Accept resignation (verbal and written)
- ☐ Notify HR: hr@novatech.com
- ☐ Schedule 1:1 to discuss transition
- ☐ Notify skip-level manager
- ☐ Begin knowledge transfer planning

Week 1

- ☐ Create transition plan
- ☐ Identify knowledge transfer priorities
- ☐ Assign work to other team members
- ☐ Schedule customer/stakeholder handoffs
- ☐ Discuss final projects and deadlines

Week 2+ (Final Week)

- ☐ Complete knowledge transfer sessions
- ☐ Review and approve handoff documentation
- ☐ Conduct final 1:1
- ☐ Collect feedback on experience
- ☐ Thank the employee for contributions

Last Day

- ☐ Ensure all work is transitioned
- ☐ Verify access has been revoked
- ☐ Collect any company property
- ☐ Wish well and stay in touch

HR Checklist

Resignation Received

- ☐ Confirm resignation in writing
- ☐ Send offboarding packet
- ☐ Calculate final pay and PTO payout
- ☐ Schedule exit interview
- ☐ Notify benefits administrator
- ☐ Notify payroll

During Notice Period

- ☐ Conduct exit interview
- ☐ Process benefits continuation (COBRA)
- ☐ Update HRIS records
- ☐ Coordinate with IT on access removal
- ☐ Prepare final paycheck

Last Day

☐ Final pay processed
☐ Benefits termination confirmed
☐ Exit paperwork complete
☐ Company property collected
☐ Remind of ongoing obligations (NDA, etc.)

Post-Departure

☐ Send final pay stub
☐ Process 401(k) information
☐ Send COBRA information
☐ Update alumni records
☐ Close out employee file

IT Checklist

Notification Received

☐ Acknowledge offboarding request
☐ Review access and systems
☐ Schedule access revocation

Final Day (or as specified)

☐ Deactivate Okta account
☐ Deactivate Google Workspace
☐ Remove from Slack
☐ Revoke VPN access
☐ Revoke cloud access (AWS, GCP)
☐ Remove from GitHub org
☐ Remove from code repositories
☐ Remove from internal tools
☐ Remove from distribution lists

Equipment

☐ Send return shipping label
☐ Track equipment return

- ☐ Wipe returned devices
- ☐ Update asset inventory
- ☐ Confirm all equipment received

Post-Departure

- ☐ Verify all access removed
- ☐ Archive email (if required)
- ☐ Transfer file ownership
- ☐ Update documentation ownership

Departing Employee Checklist

First Week

- ☐ Submit written resignation to manager
- ☐ Complete exit survey
- ☐ Begin knowledge transfer documentation
- ☐ List all projects and responsibilities
- ☐ Identify key contacts and stakeholders

During Notice Period

- ☐ Document processes and procedures
- ☐ Train replacement or team members
- ☐ Complete handoff meetings
- ☐ Finish critical projects
- ☐ Update documentation

Final Week

- ☐ Complete all transitions
- ☐ Return company equipment
- ☐ Delete personal files from company devices
- ☐ Update personal contact info with HR
- ☐ Complete exit interview
- ☐ Submit final expenses
- ☐ Set out-of-office message
- ☐ Say goodbye to colleagues

Final Day

- ☐ Return all company property
- ☐ Turn in badge/keys (if applicable)
- ☐ Confirm final paycheck details
- ☐ Sign any required documents
- ☐ Collect personal belongings

Knowledge Transfer

Required Documentation

Document	Owner	Deadline
Project status	Employee	1 week before
Process documentation	Employee	1 week before
Key contacts	Employee	1 week before
Access/credentials	Employee	Final day
Open issues/tickets	Employee	Final day

Handoff Meetings

Meeting	Attendees	Timing
Team handoff	Team + Manager	Week 1-2
Customer handoff	New owner + Employee	As needed
Stakeholder intro	Key contacts	As needed

Documentation Location

All handoff documentation should be stored in: - Confluence: Team space > Offboarding > [Employee Name] - Shared drive: As appropriate - Not in personal folders

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Equipment Return

What to Return

- ☐ Laptop
- ☐ Monitors
- ☐ Keyboard and mouse
- ☐ Headset
- ☐ Webcam
- ☐ Adapters and cables
- ☐ Any other company equipment

Return Process

1. IT sends prepaid shipping label
2. Pack equipment securely
3. Ship within 5 business days
4. Send tracking number to IT
5. IT confirms receipt

Non-Return Policy

Failure to return equipment may result in: - Deduction from final pay (where legal) - Invoice for equipment value - Collection action

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Final Pay

Included in Final Pay

Item	Timing
Salary through last day	Final paycheck
Accrued, unused PTO	Final paycheck
Expense reimbursements	Final paycheck
Commission (if applicable)	Per commission plan
Bonus (if applicable)	Per bonus plan terms

Deductions

- Standard tax withholdings
- Benefit premiums (final month)
- Equipment not returned (if applicable)

Payment Timing

- Final paycheck: Next regular pay date
- Some states require immediate payment

Benefits Continuation

Health Insurance (COBRA)

- Coverage can continue for up to 18 months
- Employee pays full premium + 2% admin fee
- Election period: 60 days from termination
- COBRA information sent within 14 days

401(k)

Options for 401(k) balance: - Leave in NovaTech plan (if eligible) - Roll over to new employer plan - Roll over to IRA - Cash out (taxes and penalties apply)

Other Benefits

Benefit	Status at Termination
Life insurance	Ends, conversion option available
Disability	Ends
EAP	30 days post-termination
Headspace	Ends
L&D budget	Forfeited

Exit Interview

Purpose

- Gather feedback on employee experience
- Identify improvement opportunities
- Understand departure reasons
- Maintain positive relationship

Topics Covered

- Reason for leaving
- Job satisfaction
- Management feedback
- Company culture
- Suggestions for improvement
- Would they recommend NovaTech?

Confidentiality

Exit interview feedback is: - Confidential (not shared with manager by name) - Aggregated for trend analysis - Used for improvement initiatives

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Ongoing Obligations

Reminder of Agreements

Employees are reminded of ongoing obligations: - Non-disclosure agreement - Invention assignment agreement - Non-solicitation (if applicable) - Return of confidential information

What Employees Must Not Take

- Customer lists
- Proprietary code
- Trade secrets
- Confidential documents
- Product roadmaps

Alumni Network

Staying Connected

Departing employees are welcome to: - Join NovaTech Alumni LinkedIn group - Attend alumni events - Refer candidates (referral bonus eligible) - Stay in touch with colleagues

Rehire Eligibility

Employees who leave in good standing are eligible for rehire. Rehire policy: - Waiting period: None (for good standing) - Benefits: Based on new hire date - PTO: Restarts

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Timeline Summary

Timing	Key Activities
Day 1	Manager + HR notified, planning begins
Week 1	Knowledge transfer starts, exit interview scheduled
Week 2+	Handoffs, documentation, transition
Final Day	Access revoked, equipment return, farewell
Post	Final pay, COBRA, equipment tracking

Contact

- **HR:** hr@novatech.com
- **IT:** it@novatech.com
- **Payroll:** payroll@novatech.com
- **Benefits:** benefits@novatech.com

Related Documents

- Resignation Policy (HR-EMP-020)
- Equipment Return Policy (IT-HW-010)

- Final Pay Policy (HR-COMP-005)
- NDA and IP Agreement (Legal)

Review Cycle: Annual Next Review: March 2025