



AUTOMATE **EVERY** EMPLOYEE TRANSITION

HR OFFBOARDING CHECKLIST

89% of former employees still had access to at least one system after departing
Only 40% of voluntary departures said offboarding was handled well

You can both reduce your risk and build more engaged alumni.

Notification & Legal Review

- Confirm the separation date and type (voluntary, involuntary, RIF, retirement)
- Review applicable employment contract terms, severance obligations, and non-compete clauses
- Identify state-specific requirements: separation notice obligations, final pay deadlines, unemployment documentation
- Prepare and issue formal separation documentation
- Communicate the separation date, severance details, and benefits status to the employee clearly and in writing
- For involuntary exits: ensure legal review is completed before the conversation with the employee occurs

Documentation

- Calculate and process final paycheck including all accrued PTO - deadlines vary by state, make sure this is updated
- Generate W-2 and applicable tax documentation
- Issue COBRA continuation coverage information within the legally required window (typically 14 days after qualifying event)
- Prepare and issue state-mandated separation notices where required
- Update HRIS records with accurate separation date, reason code, and eligibility for rehire status
- Collect and verify any updated contact or banking information for final disbursements
- Ensure all documentation is stored in a centralized, auditable system

Inconsistency across managers and locations is one of the most common sources of compliance exposure, especially at enterprise organizations.

Two employees exiting should have identical processes, no matter who handles it or where they're located.



What ROI can you gain from greater automation? Find out in minutes!



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Knowledge Transfer

- Identify the departing employee's key responsibilities, ongoing projects, and critical relationships
- Assign documentation responsibilities and set realistic completion timelines within the notice period
- Schedule handoff meetings with key internal stakeholders and, where appropriate, clients or external partners
- Ensure access to critical files, systems, and documentation is transferred to appropriate team members
- For involuntary exits where notice period doesn't apply: have a rapid knowledge capture protocol ready to deploy

Don't wait until their last week to document everything - an automated workflow helps you keep this front-and-center and minimize the impact of expertise leaving

That means having a way to do this fast when its an involuntary departure, too.

Access Management

- Generate a complete inventory of company-owned equipment: laptop, phone, peripherals, access cards, keys
- For remote employees: coordinate device return with prepaid shipping and confirm receipt
- Submit IT access revocation requests for all systems: email, HRIS, CRM, project management tools, cloud storage, VPN
- Revoke building access and physical security credentials
- Ensure sensitive data is securely deleted or archived in compliance with your data retention policy
- Audit active third-party application access; SaaS tools that were provisioned independently of IT are a common gap, managers should have a full list handy
- Confirm completion with a documented sign-off before the separation date

Who owns the *entire* offboarding process? If the answer is "nobody" or "HR" then you have an issue.

Alumni Engagement

- Schedule the exit interview before the employee's last day when the employee is distracted and pressed for time;
- Block a full hour for the discussion - it may take far less, but it signals you're serious and want to learn and give them the time to explain and actually gives that time for follow-up questions
- Keep the format structured, but conversational, with a short set of consistent questions that can show trends over time
- Topics should include overall experience, reasons for leaving (if voluntary), feedback on management and culture, suggestions for improvement, and openness to future opportunities
- Route insights to the right stakeholders ... not just HR, but relevant managers and leadership where patterns emerge and tie the story that's being told back to a business KPI
- For employees open to staying connected: add them to an alumni program and maintain periodic touchpoints
- Acknowledge the employee's contributions formally - a personal note from their manager costs nothing and is remembered