

Employee Offboarding

Onsite Roles Checklist

How to use: Check each item as completed.

01

Voluntary Termination

Notice & Preparation

☐	Receive and document employee's notice of resignation (If verbal resignation, provide employee with written confirmation of resignation and save copy)
☐	Note whether the employee is re-hirable as yes or no
☐	Provide notice of policy regarding any outstanding balances for money owed to the company if applicable (i.e. educational loans, pay advances, etc.)
☐	Notify Payroll to process final check

02

Involuntary Termination

Notice & Preparation

☐	Provide employee with termination communication
☐	Provide employee with severance agreement if applicable
☐	Provide employee with WARN/OWBPA notices if applicable
☐	Provide employee with required Federal and State Regulatory Separation Documents
☐	Note whether the employee is re-hirable as yes or no
☐	Notify Payroll to process severance pay once severance agreement has been returned (after 7-day legal hold) and whether lump sum or salary continuation if applicable

03

Benefits

Benefits & Compensation

	Provide employee with termination/continuation of insurance benefits information (COBRA, life insurance, etc.)
	Check PTO balance and inform the employee of any remaining PTO and how it will be processed at termination of employment if applicable
	Inform employee about retirement plan options

04

Exit Interview

Feedback & Documentation

	Conduct an exit interview to gather feedback
	Document responses and share relevant feedback with leadership if applicable

05

Final Day

Equipment & Access

	Revoke access to all systems and tools
	Remove from mailing lists and internal directories
	Collect company items if applicable (Keys, badges, etc.)
	Clean work area and remove personal belongings
	Pull personnel file to be stored with terminated employee files
	Pull Form-I9 to be stored with terminated employees' I-9s

Company customization: Add your logo and brand colors when deploying this checklist.