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HR's Comprehensive
Offboarding Checklist

How to Guide:
Using Omni's Offboarding Checklist

While onboarding focuses on integrating new employees into the company, offboarding is equally important because it ensures a smooth transition for departing employees as well as the teams they leave behind.

Providing a positive and organized offboarding experience reflects your employer brand and reputation, covers your legal and compliance obligations, and smooths the workflow transition.
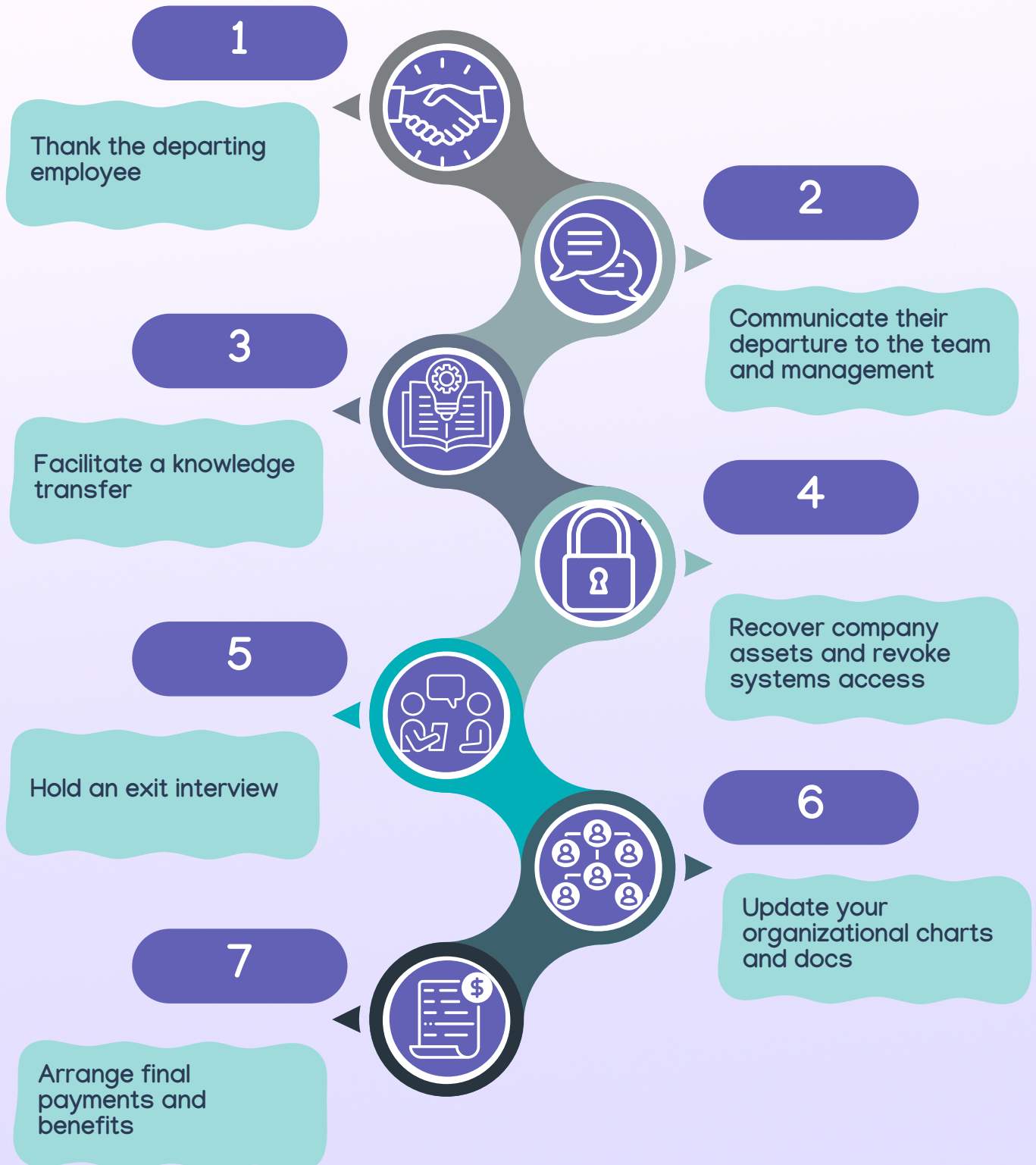
Our employee offboarding checklist template makes it easy for HR and managers to provide a consistent and comprehensive offboarding experience. You can save this checklist to refer to every time you offboard an employee, and customize the tasks to best support your organization's needs.

With Omni HR's all-in-one platform, you can digitize, customize, and automate your entire offboarding process on one, easy-to-use platform. Create action items, set automatic reminders, and easily track offboarding tasks for various employees, so you can free up your valuable time for what matters most.

Learn how Omni HR helps streamline and standardize your offboarding process.

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OFFBOARDING TIMELINE

1

Thank the departing employee

2

Communicate their departure to the team and management

3

Facilitate a knowledge transfer

4

Recover company assets and revoke systems access

5

Hold an exit interview

6

Update your organizational charts and docs

7

Arrange final payments and benefits

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EMPLOYEE OFFBOARDING CHECKLIST

☐ **Thank employee**

    ☐ Send a formal email documenting the conversation

☐ **Communicate employee's departure**

    ☐ Send email to manager

    ☐ Include employee departure date

    ☐ Schedule a meeting with manager to discuss next steps for the vacant position

    ☐ **Send email to direct team**

    ☐ Include employee departure date

    ☐ Communicate gratitude for the employee's contribution

    ☐ Include a positive note regarding moving forward with division goals

    ☐ **Send email to company at large**

    ☐ Include employee departure date

    ☐ Communicate gratitude for the employee's contribution

    ☐ Include a positive note regarding moving forward with company goals

☐ **Knowledge transfer**

    ☐ Assign handover document to departing employee

    ☐ A clear overview of the daily tasks they perform

        ☐ Rank priority

    ☐ A list of ongoing projects

        ☐ Rank priority

        ☐ Communicate status

    ☐ Access rights to all the systems and files they use

    ☐ A list of people they work with, both inside and outside the organization

        ☐ Include contact details for external contacts

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EMPLOYEE OFFBOARDING CHECKLIST

- ☐ **Revoke system access**
  - ☐ Internal systems such as email
  - ☐ External log-in credentials
  - ☐ Credit card access
- ☐ **Recover company assets**
  - ☐ Computer
  - ☐ Cell phone
  - ☐ ID badge
  - ☐ Company credit card
- ☐ **Exit interview**
  - ☐ Schedule a time to meet
  - ☐ Ask questions and record responses
  - ☐ What factors contributed to your decision to leave?
  - ☐ What might have been done to prevent you from leaving?
  - ☐ What makes your new job more attractive than your present job?
  - ☐ How was your overall experience working for this company?
  - ☐ What do you like most about working here?
  - ☐ What do you like the least about working here?

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EMPLOYEE OFFBOARDING CHECKLIST (cont.)

- [ ] **Update company information**
  - [ ] Organizational chart
  - [ ] Email groups to remove employee email
  - [ ] Website
  - [ ] Remove employee name from templates
- [ ] **Arrange final payments**
  - [ ] Calculate and facilitate final payroll
  - [ ] Complete any pending employee reimbursements
- [ ] **Update benefits**
  - [ ] Inform benefits facilitators of employee end date
  - [ ] Set for benefits to terminate

To access your customizable form, download here and make a copy.

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Getting Started with Employee Offboarding Surveys

Whether you're looking to roll out a new employee offboarding survey or upgrade your current one, this employee offboarding template can help tap into actionable insights to help shape your company culture and improve employee retention.

Any survey tool will work well to gather feedback from your employees. If you're looking for a low-effort, high-reward system that allows you to automate the employee survey process, Omni can help you build, administer, follow up, and analyze survey data in one, simple platform. With Omni, you can automatically schedule surveys based on your employee's departure date, use our comprehensive and customizable survey templates, and easily review employee's responses to build actionable strategies to improve your company culture and offboarding process.

With Omni, HR managers and business owners can free up valuable time to focus on what matters most for their business.

To see Omni in action, schedule a product tour, or visit us at https://omnihr.co/.

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