

Offboarding Checklist

Employee Name: _____

Position: _____

Final day worked: _____

| | REQUIRED ACTION | Who is responsible | Date Completed |
|---|---|--------------------|----------------|
| COMMUNICATION Hearing the news from you and not the grapevine will help to build trust & transparency, and reduce gossip. | Thank the employee for their service. <i>Former employees can be ambassadors, customers and will likely remain friends with current employees. How you treat them matters.</i> | | |
| | Internal Departmental Communications: <i>Some departments need to be notified immediately to begin their roles in the offboarding process, such as IT, HR, & Payroll.</i> | | |
| | Internal staff communications: <i>Let your staff know they will be moving on (or have moved on) and who will be taking over their responsibilities going forward</i> | | |
| | External Communications: <i>If the employees role interacted with external stakeholders, communicate the departure along with who will be their new contact person.</i> | | |
| KNOWLEDGE TRANSFER CRITICAL for business continuity | A clear overview of the daily tasks they perform, especially critical & high priority tasks | | |
| | Location & Access rights to all systems, programs and files they use | | |
| | A list of people they work with, both inside & outside the organization. | | |
| | Provide relevant training to staff who are absorbing new responsibilities | | |
| | Ensure their emails, phone & voice mails are being monitored past their departure. | | |
| EXIT INTERVIEW | Make sure that you learn something from the offboarding process. | | |
| | What should you stop doing, keep doing or start doing to make the employee experience better? | | |
| | Refer to the <u>Exit Interview template</u> . | | |
| RECOVER COMPANY PROPERTY | This will vary across companies and roles, but typically can include: <ul style="list-style-type: none"> • Keys, FOBS & lanyards • Laptop, monitors & computer accessories • Home office equipment, if supplied by the company • Cell phone • Gas or Credit cards • Uniform & Name tags | | |
| SYSTEM ACCESS | <ul style="list-style-type: none"> • Disable user logins • Change relevant passwords to shared internal & external systems | | |

| | | | |
|------------------------------|---|--|--|
| COMPLETE FINAL PAY | <ul style="list-style-type: none"> • Collect final time sheets or other applicable documentation • Calculate vacation allotment & payout • Final bonuses/commissions/tips • Complete within allotted timeframe. <p>As a Saskatchewan employer, you must comply to The Saskatchewan Employment Standards Act when it comes to termination pay. When adequate notice is given (either by the employee or the employer in the case of termination) the employee's earning must be paid within 14 days of their last day of work. If a payday falls within those 14 days, the employee must be paid for the pay period on their regular payday.</p> <p>The termination pay must include:</p> <ul style="list-style-type: none"> • Regular wages and any banked overtime. • Public holiday pay. • Pay instead of notice. • Vacation pay. | | |
| | <ul style="list-style-type: none"> • Complete ROE & T4 | | |
| REMOVE FROM INTERNAL SYSTEMS | <ul style="list-style-type: none"> • Removal from Payroll system after final pay • Removal from group benefits • Removal from internal org charts, company directory, phone directory, website... • Redirect emails & phone numbers | | |