

Offboarding Checklist Template

Source: People Operations — Northbridge Advisory Partners Version: 2.1 (current template version) Owner: Employee Relations Specialist, People Operations

Standard Offboarding Checklist

This template applies to all voluntary and involuntary departures. Adjust tasks based on role, department, and system access level.

Section A — IT & Systems Access

#	Task	Owner	Due	Notes
A1	Disable Active Directory account	IT Service Desk	Last working day	Triggers email and VPN deactivation
A2	Revoke SAP SuccessFactors access	HRIS Administrator	Last working day	
A3	Revoke CRM access	IT Service Desk	Last working day	
A4	Remove from SharePoint sites and Teams channels	Departing employee's manager	Last working day - 1	Manager to confirm which channels
A5	Revoke code repository access (Azure DevOps, GitHub)	IT Service Desk	Last working day	Only if applicable
A6	Transfer or archive email mailbox	IT Service Desk	Last working day + 5	Requires manager approval
A7	Collect laptop and peripherals	IT Service Desk	Last working day	Asset tags required for sign-off
A8	Deactivate building access badge	Facilities	Last working day	
A9	Revoke Power BI and analytics dashboard access	IT Service Desk	Last working day	

Section B — Knowledge Transfer

#	Task	Owner	Due	Notes
B1	Identify critical documents and project files for handover	Departing employee + Manager	Notice period start + 5 days	
B2	Schedule handover sessions with receiving team member(s)	Manager	Notice period start + 7 days	At least 2 sessions recommended
B3	Update shared documentation and SOPs	Departing employee	Last working day - 3	
B4	Transfer ownership of recurring reports or dashboards	Departing employee + Manager	Last working day - 5	
B5	Complete client relationship handover (client-facing roles only)	Departing employee + Manager	Last working day - 7	Notify Client Relationship Manager

Section C — Administrative & HR

#	Task	Owner	Due	Notes
C1	Process final pay and accrued leave payout	Payroll	Last pay cycle after departure	
C2	Issue experience letter or reference confirmation	HR Coordinator	Last working day + 10	On request only
C3	Update HRIS record to "Departed" status	HRIS Administrator	Last working day + 1	
C4	Conduct exit interview	HR Coordinator	Before last working day	See Exit Interview Protocol
C5	File exit interview notes in employee record	HR Coordinator	Last working day + 3	

#	Task	Owner	Due	Notes
C6	Notify benefits provider of termination	Compensation Analyst	Last working day + 5	
C7	Remove from company distribution lists	HR Coordinator	Last working day	
C8	Reclaim company credit card (if issued)	Finance	Last working day	
C9	Close travel and expense accounts	Finance	Last working day + 5	

Section D — Compliance

#	Task	Owner	Due	Notes
D1	Confirm return of confidential materials	Manager + Legal	Last working day	Physical and digital
D2	Remind departing employee of NDA and non-compete obligations	HR Coordinator	Last working day - 3	Provide signed copy
D3	Archive project files per data retention policy	Manager	Last working day + 10	Refer to Records Management Policy v3.1
D4	Revoke client site access (if applicable)	Practice Head	Last working day	Coordinate with client admin

Known Template Issues

- **Section A / Task A6:** The five-day window for mailbox archival was set in 2023. IT has since moved to a 30-day auto-archive policy, but this template still references the old timeline. Confirm current process with IT Service Desk.
- **Section B / Task B5:** "Client Relationship Manager" is a role title used in the Financial Advisory practice only. Other practices use "Engagement Lead" or "Account Director" — the template has not been updated to reflect current role naming.
- **Section C / Task C6:** This task assumes all employees are on company benefits. Contractors and fixed-term employees on the managed-services contract may not have company benefits — the template does not distinguish between employment types.
- **Section D / Task D3:** References "Records Management Policy v3.1" but the current version is v4.0 (current policy publication). The policy reference is stale.