Office Staff Departure Checklist

Departing Individual

Today's date:	
Name of departing employee:	
Manager name:	
Last day of work:	

The individual named above is leaving the Company. Please ensure that each item assigned to you on this checklist is completed before his/her last day of work.

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Checklist – Manager of Departing Employee

☐	If the employee resigned, obtain resignation letter. Forward original letter to HR and a copy to Payroll.
☐	Obtain items identified below from the departing employee **on or before** the employee's last day, and forward the items to the appropriate individual. • office keys • vehicle • vehicle keys • gas card • credit card • mobile phone • lap top • printed Company documents including manuals or books • return of digital Company documents • job-specific procedures • passwords
☐	Before the employee's last day of work, advise IT how their email and voicemail will be handled.
☐	Communicate to Dispatch where phone calls for the employee should be forwarded in interim.
☐	Arrange/delegate final get-together and card for departing employee. This may be a lunch or an after-hours gathering. **Note:** This is the responsibility of the departing employee's team and is not organized by HR or Administration.

☐	Ensure the employee's departure is announced to everyone internally as soon as is appropriate. Check with HR if unsure about the timing of announcement. The following is a starting point script for an announcement for departing employees who have resigned. **Resignation – example script** *It is with regret that we announce the departure of Jane Doe. Jane has been with us since 2005 in the position of Accounting Clerk and is leaving the Company effective July 18 to pursue other career opportunities.* *We will miss Jane as she was a key part of the Finance Team and is highly regarded.* *We are organizing a small get-together to wish Jane well. This will be held at Lombardi's on Mitchell Street on July 18 at 5:00 PM.* *We are currently in the process of finding a replacement for Jane. In the meantime, John Day will be the contact person for Jane's job responsibilities.* *Please join me in wishing Jane all the best in her future endeavors. She will truly be missed.*
☐	Remove any online presence of the employee associated with the Company: ◆ If mentioned on website Management Page ◆ LinkedIn or social media presence
☐	Ensure the employee's departure is announced externally as appropriate. For example, if the departing employee had a strong presence externally, external stakeholders must be notified.
☐	Review/Delegate the contents of the departing employee's office/desk and filing cabinets, and distribute materials as appropriate. Ensure work area is tidy and organized.

Checklist – IT

As soon as the employee has left at the end of their last day of work:

☐	Deactivate or change all computer passwords and login credentials.
☐	Ensure that the employee is no longer able to access the server via VPN, remote desktop, or email/webmail.

As soon as possible after the employee's last day:

☐	Disable voicemail or record a temporary voicemail greeting redirecting the caller to an alternate contact in interim.

☐	Create back up of the employee's local computer drive.

Checklist – Office Administration

☐	Delete departing employee from staff directory phone list.

Checklist – Payroll

Before the employee's last day of work:

☐	Determine if the employee owes any money to the Company, and if so, should be deducted from the last pay check.
☐	Obtain accurate vacation balance & prepare the final payroll for the employee.
☐	Prepare ROE.
☐	Remove departing employee from payroll.
☐	Terminate departing employee's benefits with all external carriers.
☐	Inactivate from any database or timesheets list