

# Post-exit Employee Transition Checklist for HR

The **post-exit employee transition checklist** for HR ensures a smooth offboarding process by covering essential tasks such as knowledge transfer, access revocation, and final documentation. This checklist helps maintain organizational security and supports seamless continuity of operations. Proper execution of these steps also fosters positive relationships and protects the company's interests.

## Checklist

- 1. Knowledge Transfer**
  - Ensure completion of all ongoing projects or designate successor.
  - Document and transfer critical job responsibilities.
  - Capture and share work-related passwords and procedures as appropriate.
- 2. Access Revocation**
  - Terminate access to company systems, networks, and software.
  - Revoke building access cards and ID badges.
  - Update security groups and distribution lists.
- 3. Final Documentation**
  - Collect exit interview feedback.
  - Provide final payslip and benefits information.
  - Issue employment verification or reference letters if requested.
- 4. Return of Company Property**
  - Recover laptops, phones, keys, credit cards, and other company equipment.
  - Ensure clearance of software licenses.
- 5. Records Update**
  - Update HRIS records to reflect departure.
  - Archive employee files as per legal requirements.
- 6. Notifications & Communication**
  - Notify relevant teams and stakeholders of employee's exit.
  - Update organizational charts and team documents.
- 7. Continued Support**
  - Share details of final benefits or COBRA options where relevant.
  - Provide contact details for post-employment queries.