

Staff offboarding checklist

Fill in this page when someone hands in their notice, then send both pages to IT. IT means your IT company, or whoever looks after IT in your business.

1. The leaver

Detail	Complete here
Leaver's name and role	
Last working day	
Time their access should stop	
Leaver's manager	
Person accountable for this checklist	

2. Email and files

Detail	Complete here
Who receives their email after they leave	
Auto-reply wording, if you want one	
Who needs their files (OneDrive or Google Drive)	
Date to delete their mailbox and files	

3. Devices

Device (laptop, mobile, tablet)	Reuse, wipe or recycle	Date returned

4. Other logins

List each login outside Microsoft 365 or Google Workspace: bank, accounting, payroll, CRM, social media, website. Include any account that sends codes or renewal notices to the leaver's email or mobile.

System	Hand over to, or close	Date done

Do not put passwords or recovery codes in this form.

Checks and sign-off

Tick each task when it is done. IT completes section 6 and returns this page.

5. On the last working day

Done	Task	Owner
☐	Collect keys, door fob, ID badge and company card	Manager
☐	Collect every device listed in section 3, with chargers and USB drives	Manager
☐	Ask the leaver to remove work email and apps from their own phone	Manager
☐	Hand over or close every login listed in section 4	Manager
☐	Change the Wi-Fi password, alarm code and any shared passwords they knew	Manager

6. IT confirms

Check	Done / outstanding / N/A
Sign-in to Microsoft 365 or Google Workspace blocked at the time in section 1	
Access to the server, shared drives and remote access removed	
Phone extension switched off, or calls forwarded	
Email forward or auto-reply switched on, as asked in section 2	
Named colleague can open the mailbox and files	
Leaver removed from email groups and shared mailboxes	
No rule forwards their email to a personal address	
Each device wiped, reused or recycled, as asked in section 3	
Licences removed from the account, then reused or cancelled	
Mailbox kept as a shared mailbox or archive until the delete date	
Leaver can no longer ask IT for changes	

7. Within one month

Done	Task	Owner
☐	Check the next IT bill shows the lower licence count	Manager
☐	Put the delete date from section 2 in the diary	HR

8. Sign-off

Detail	Complete here
Completed by	
Date	