Plan employee offboarding

Coordinate approved access changes, business records, and the handover.

Employee / role

Effective date, time, and time zone

Authorized by / request reference

IT contact / handover owner

Agree the plan before changing accounts

Records to preserve / approved recipient / retention decision owner

- [ ] **Approve the cutoff.** Confirm timing, the account list, and who can authorize changes.
- [ ] **Secure primary access.** Block relevant sign-ins and revoke sessions as appropriate. Check linked identity systems.
- [ ] **Check separate applications.** Include payroll, accounting, remote access, phones, websites, and other business tools.
- [ ] **Preserve and transfer work.** Decide how records will be kept before deleting accounts or removing licenses.
- [ ] **Recover company items.** Track computers, phones, security keys, badges, and other equipment.
- [ ] **Review shared access.** Check delegated access, forwarding, shared credentials, and recovery contacts.
- [ ] **Reassign dependencies.** Move automations, renewals, subscriptions, calendars, and customer communication.
- [ ] **Verify and document.** Confirm completed actions and assign every remaining exception.

Keep completed copies in a restricted business system. Record references and owners, never passwords. Follow your organization's approved retention and device policies.

Verify the handover

Check individual systems and record what is complete, pending, or not applicable.

Employee / request reference

Reviewed by / date

System / account reference	Approved action / evidence reference	Owner / status

Confirm the receiving person can use the work

- ☐ **Business records are available.** Approved recipient can find and use the retained mailbox, files, and other work.
- ☐ **Communication has an owner.** Confirm incoming messages, phone routing, recurring tasks, and customer follow-up.
- ☐ **Equipment is accounted for.** Record returned items and a follow-up plan for anything outstanding.

Pending item / responsible person / due date

Completion confirmed by

Completion date / time

Guide: battlecreekit.com/employee-it-offboarding-checklist/