FLUXLABS

CHECKLIST · OFFBOARDING

When an employee leaves

Most problems after a departure come from accounts nobody turned off. Do these on their last day.

Name _____ Email goes to _____

Last day _____ Files go to _____

Manager _____ Requested by _____

BEFORE THEY GO

Plan

- [ ] Tell IT the date and time access should end
- [ ] Decide who gets their email and files
- [ ] List shared passwords they know
- [ ] List accounts in their name (vendors, banks, websites)

LAST DAY

Switch off

- [ ] Turn off their sign-in and sign them out everywhere
- [ ] Forward their email or set an auto-reply
- [ ] Remove them from the work phone app
- [ ] Collect laptop, phone, keys, badge and tokens

SAME WEEK

Clean up

- [ ] Change shared passwords and door codes
- [ ] Move vendor and bank accounts to someone else
- [ ] Back up their files before anything is wiped
- [ ] Update the website, phone tree and email lists

WITHIN 30 DAYS

Close out

- [ ] Remove the license, so you stop paying for it
- [ ] Wipe and reuse or retire their computer
- [ ] Decide when to delete the mailbox
- [ ] Note it all in their file

Leaving on bad terms?

Call IT before you tell them, so access can be switched off the minute the conversation starts.