Klarstig

# Finance Healthcare & Wellness Employee Offboarding Checklist

Work through the checks for the activity and record exceptions. Mark a step complete only when its required evidence is available.

## Contact and reference

**Organization using this document**

**Your name or contact reference ***

**Email for a reply if needed**

## Information for this document

**Date of checks ***

**Person performing checks ***

**Access permissions reviewed ***

- ☐ Complete
- ☐ Pending
- ☐ Not applicable

**Equipment and supplies checked ***

- ☐ Complete
- ☐ Pending
- ☐ Not applicable

**Required information shared with the team ***

- ☐ Complete
- ☐ Pending
- ☐ Not applicable

**Records and handover updated ***

- ☐ Complete
- ☐ Pending
- ☐ Not applicable

### Unfinished items and exceptions

### Follow up owner and due date

## Specific details

### Departing role and final working date

Complete when relevant to this request.

### Access removal asset return records transfer and outstanding ownership

## Operating context

### Facility service or administrative reference

Complete when relevant to this request.

### Practical access scheduling and authorized communication arrangements

## Team specific details

### Cost center ledger or finance reference

Complete when relevant to this request.

### Budget allocation authorization reconciliation and supporting evidence

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

### Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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