Klarstig

Procurement Travel 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

Trip itinerary destination or booking reference

Complete when relevant to this request.

Travel dates party size accessibility and coordination needs

Team specific details

Sourcing request supplier or purchasing owner

Complete when relevant to this request.

Specifications alternatives approval limits and delivery requirements

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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