**Sample Staff Off-Boarding Checklist**

Employee Name: [INSERT EMPLOYEE NAME]

Title: [INSERT EMPLOYEE JOB TITLE]

Last Day of Work: [INSERT LAST DAY OF WORK]

Advise, retrieve, cancel, or secure the following items:

* Office Key Returned
* Remove EHR App from phone
* Delete any EHR-connected email inbox from phone and delete patient emails
* Ensure employee-signed Non-Solicitation, Non-Disclosure, and Confidentiality Agreement on file
* Advise to direct any future patient contacts received directly to office phone number
* Ensure all personal property is removed

Finances, Payroll and Final Pay Period:

* Final Time Sheet Provided
* Last pay date: \_\_\_\_\_\_\_\_\_ (direct deposit will be completed following last day)
* Direct Deposit – Yes
* Cancel Insurance benefits
  + Health – done, effective \_\_\_\_\_ (date)
  + Dental – done, effective \_\_\_\_\_ (date)
  + Vision – done, effective \_\_\_\_\_ (date)
  + Health Savings Account – notify change of employee status after final contribution is made
  + (other applicable accounts if any)

Office Security:

* Change passcode to office entrance door (or change keys)
* Remove electronic access:
* Disable email account access
* Auto-forward emails to preferred office email account
* Remove access to Electronic Medical Software
* Change passwords for all business account, office supply accounts, passwords of other familiar
* accounts for software account

Note the distinction between deleting and disabling user and login IDs and email accounts. Deleting IDs and accounts could result in the loss of data and other relevant information if there is to be an audit or review of THE departing employee’s work. Disabling IDs and accounts will prevent access and help preserve relevant information.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of person conducting: [INSERT NAME] Date: