Employee Offboarding Worksheet

Access, records, and completion evidence | Updated 2026-10-11

Start with the departure details

Complete this worksheet for each employee who leaves the firm. Fill in the details below, then record the outcome for each system on the following pages.

Person leaving

Coordinator

Cutoff date

Cutoff time

Cutoff time zone

Attorney approving preservation

Completion reviewer

Before deleting accounts or erasing devices

Agree on the access cutoff. Preserve required records before deleting accounts, removing licenses, or erasing devices. The responsible attorney approves preservation and who may receive client records.

How to complete the system sheets

01 Assign: Replace suggested roles with names. Add copies for other systems or devices.

02 Check: Verify access removal and authorized record handover separately.

03 Record: Enter dated evidence and a reviewer. Mark Verified only after the evidence is checked.

04 Follow up: Mark unfinished work Pending, with an owner and date. Explain Not Applicable entries.

Keep passwords and unnecessary client details out of this worksheet. Store completed copies in approved firm storage. Escalate suspicious access to the firm's incident lead. This is a planning aid, not legal advice or proof that access has been removed.

Employee Offboarding Worksheet

Person leaving: _____ Coordinator: _____

1. Microsoft 365 sign-in

Check: Sign-in blocked; existing sessions addressed; delays recorded

Hand over: Email and file preservation plan

Suggested owner: IT administrator

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date

2. Email mailbox

Check: Former-user access removed; forwarding and approved readers checked

Hand over: Required email and incoming client inquiries

Suggested owner: Email administrator

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date

Employee Offboarding Worksheet

Person leaving: _____ Coordinator: _____

3. OneDrive, shared folders, Teams

Check: Permissions and sharing checked; successor can open approved files

Hand over: Matter files and required conversations

Suggested owner: File-system owner

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date

4. Matter and document systems

Check: Account disabled; sessions addressed; tasks reassigned

Hand over: Documents, deadlines, notes, activity history

Suggested owner: Software administrator

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date

Employee Offboarding Worksheet

Person leaving: _____ Coordinator: _____

5. Client portals and court filing

Check: Firm access or association changes confirmed

Hand over: Continuing access for authorized staff

Suggested owner: Portal owner or outside contact

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date

6. Billing, e-signature, other services

Check: Account and approval rights removed

Hand over: Billing records, signed documents, outstanding work

Suggested owner: Each software owner

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date

Employee Offboarding Worksheet

Person leaving: _____ Coordinator: _____

7. Remote access and admin accounts

Check: Access and connections ended; known shared credentials rotated

Hand over: Transferred responsibilities and relevant access records

Suggested owner: IT administrator

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date

8. Devices, keys, security devices

Check: Return documented; approved data removal confirmed

Hand over: Required local files; unresolved copies or missing property

Suggested owner: Office manager and IT

Assigned owner

Status (choose one) ☐ Verified ☐ Pending ☐ Not Applicable

Completion date

Reviewer

Evidence location (dated confirmation or saved change record)

Not Applicable explanation / Pending item or unresolved issue

Follow-up owner

Follow-up date