

End User Termination Checklist

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Use this checklist whenever an employee's system access must be revoked and company assets recovered at Ascent Strategies Group.

Termination Overview

Field	Details
Employee Name	
Employee ID	
Department	
Position / Title	
Manager	
Termination Type	Voluntary / Involuntary / Layoff / Retirement
Last Day Worked	
Access Revocation Effective	Immediate / End of Day / Scheduled
Initiated By	
Client (if applicable)	

Pre-Termination & Access Revocation

Pre-Termination Actions

- ☐ HR has notified IT/Security of the termination date and effective time
- ☐ Manager has notified relevant department heads
- ☐ Exit interview scheduled
- ☐ Data/knowledge transfer plan confirmed with manager
- ☐ Return-of-equipment instructions sent to employee

System & Application Access Revocation

- ☐ Active Directory / network login disabled
- ☐ Email & calendar access revoked (mailbox forwarded/archived per policy)
- ☐ VPN / remote access revoked
- ☐ ERP system access revoked
- ☐ CRM system access revoked or reassigned
- ☐ File shares / SharePoint / OneDrive access revoked; ownership transferred
- ☐ Finance / accounting system access revoked
- ☐ HR / payroll system access updated (final pay processed, then access removed)
- ☐ Help desk / ticketing system access revoked
- ☐ Badge / building access deactivated
- ☐ Other systems revoked (specify):

Equipment, Data & Security

Equipment & Asset Return

- ☐ Laptop / desktop returned
- ☐ Monitor / peripherals returned
- ☐ Mobile phone returned
- ☐ Badge / key fob / keys returned
- ☐ Company credit card returned or deactivated
- ☐ Other company property returned (specify):

Data & Security

- ☐ Personal files backed up and removed from company systems
- ☐ Company data retained per records retention policy
- ☐ Shared account passwords/credentials rotated
- ☐ Email forwarding / auto-reply rules reviewed and removed after transition period
- ☐ Access logs reviewed for unusual activity prior to termination

Communications & Sign-Off

Communications & Administrative

- ☐ Removed from distribution lists, Teams/Slack channels
- ☐ Org chart and directory updated
- ☐ Auto-reply / out-of-office message set (if applicable)
- ☐ Final paycheck, COBRA / benefits information provided
- ☐ Exit interview conducted and documented

Sign-Off

Role	Name	Date	Confirmed
IT / Security			
HR			
Manager			