



SaaS Offboarding Checklist

A practical review tool for departures, role changes, and follow-through

A disabled login does not establish that the application work is finished. Use this checklist to review access, owned information, admin roles, paid licenses, and business contacts when someone leaves or changes roles.

Review one person and event. Keep evidence, assigned actions, and open items in a shared review record.

HOW TO USE THIS CHECKLIST

YES Confirmed with evidence	PARTIAL Evidence or work is incomplete	NO Not established or not started
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Mark one response per row. Record why any check does not apply. These responses assess the process; they do not prove every application was found or authorize access, deletion, or a savings claim.

FIRST, IDENTIFY THE EVENT

Planned departure Prepare transfers and schedule access changes. Preserve required information before destructive deletion.	Sudden departure Remove access under policy and authorized instructions. Do not wait for transfers to finish.	Role change Review old-role access and new requirements. Keep needed access; adjust or transfer the rest.
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For every event, separate access removal, information preservation, ownership transfer, deletion, and license review.

REVIEW AREAS

#	AREA	ASSESSMENT QUESTION	YES	PARTIAL	NO
01	Event & authority	Are the event, effective timing, person identifier, authorized instructions, and action owners confirmed?	☐	☐	☐
02	Application coverage	Have known accounts, licenses, admin roles, integrations, and business contacts been reviewed, with coverage gaps recorded?	☐	☐	☐
03	Access & preservation	Have required access changes been completed on time and required information preserved before destructive deletion?	☐	☐	☐
04	Ownership & continuity	Have workspace ownership, admin rights, integration dependencies, and billing or renewal contacts been addressed?	☐	☐	☐
05	License decision	Have you checked removal and reuse eligibility, new demand, and contract terms without sharing former-user credentials?	☐	☐	☐
06	Billing & exceptions	Are transfers, cancellations, remaining obligations, and justified exceptions recorded with owners and review dates?	☐	☐	☐
07	Completion evidence	Is each completed action supported by evidence, with unresolved work assigned an owner and due or review date?	☐	☐	☐
08	Continuing review	Is there an application owner and a suitable review schedule covering departures, contractors, and role changes?	☐	☐	☐

RESULTS GUIDANCE

Mostly Yes

The known application work is documented and supported by completion evidence.

PRIORITY ACTION

Check open conditions and coverage gaps. Keep the records current. A strong review does not prove all applications were discovered.

Mostly Partial

Some responsibilities are clear, but evidence or agreed actions remain incomplete.

PRIORITY ACTION

Assign each gap an owner and due or review date. Verify completed actions and keep unresolved work visible.

Mostly No

The event needs an accountable review of access and application responsibilities.

PRIORITY ACTION

Confirm the authorized instructions and action owners first. Address required access changes without waiting for transfers.

An unresolved required access change needs attention regardless of the response totals. Preserving information does not require keeping a former employee login active. Follow policy and specialist direction.

THE OFFBOARDING ACTION SEQUENCE

1 Confirm the event and authorized instructions

Establish effective timing and the right person identifier. Include contractors through the appropriate authorized source. Name the owners for each action.

2 Review known applications and responsibilities

Check accounts, paid assignments, workspaces, admin rights, integrations, and vendor contacts. Include tools outside central sign-in and record coverage gaps.

3 Separate and sequence the work

Do not delay required access removal for pending transfers. Preserve required information before destructive deletion through authorized processes.

4 Transfer responsibilities and review licenses

Assign authorized successors. Check dependencies before credential changes. Review reuse eligibility and contract terms; do not share former-user credentials.

5 Verify actions and resolve open work

Retain completion evidence and vendor confirmation where needed. Give exceptions a reason, owner, and review point. A request is not proof of completion.

6 Reconcile records and continue review

Compare relevant personnel status with known assignments and admin roles. Track open items and coverage gaps. Reusable capacity is not a verified bill reduction.

ROLE-CHANGE VARIATION

Keep access needed for the new role. Review old permissions, paid assignments, and ownership duties. Record what changes, what remains, and why.

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CLOSING INSIGHT

Start with recent departures and role changes. Confirm what happened inside the known applications, then assign and track the work that remains open.