

Staff Leave — Offboarding Checklist

Organization: Tree (tree.com.hk)

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Approved by:

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Related policy: System User Access Management

Staff details

- Staff name: _____
- Department / role: _____
- Last working day: _____
- Requested by (Manager / HR): _____
- Handled by (Admin / IT): _____

Before last day (Manager / HR)

- ☐ Notify Admin of last working day
- ☐ Confirm handover of work files to file server / successor
- ☐ Confirm return of company assets (PC, keys, cards, etc.)

Last working day — Disable access (Admin → IT if needed)

Disable / remove on the same day (or sooner if required):

- ☐ Office PC **local user** account

- ☐ tree.com.hk email (disable / forward as approved by Manager)
- ☐ File server personal folder access
- ☐ Shared folder access
- ☐ QuickBooks (if any)
- ☐ POS (if any)
- ☐ Online sales system (if any)
- ☐ Remote / VPN access (if any)

Asset return

- ☐ Office PC / laptop returned
- ☐ Access cards / keys returned
- ☐ Other company devices returned
- ☐ Confirm no company data left on personal devices

After leave

- ☐ Record offboarding date and who handled it
- ☐ Keep personal folder per company retention rule (or archive as directed by Manager)
- ☐ Confirm no shared passwords were used by this staff

Completion (internal record only)

- Admin / IT marks the checklist complete and notes that offboarding steps were **acknowledged** with Manager / HR where practical.
- Completed by (Admin / IT): _____ Date: _____
- Notes (optional): _____