

RIPLRT Institute — Offboarding Checklist (Form)

This is the **signable record** version of offboarding. The working version is the *Offboarding Checklist* template in `/templates`. We offboard deliberately so that knowledge is preserved, credit is settled, and the relationship stays strong. Complete this form during the member's **final two weeks** and return it to the PI or a designated lead.

See Chapter 19 (Onboarding, Training Milestones, and Offboarding).

Member: ____ **Role / pod:** ____ **Last active date:** ____ **Mentor / lead:** ____

Knowledge transfer

- ☐ All code committed and pushed; repositories in a clean, documented state
- ☐ **Reproducible Analysis Checklist** completed for any in-progress analysis
- ☐ README / handoff notes written for each active task or dataset
- ☐ Final data, figures, and notebooks saved to the shared project space (not only local machines)
- ☐ Outstanding tasks reassigned or formally paused in the project workspace
- ☐ Handoff meeting held with the receiving member(s) and/or PI

Credit and scholarship

- ☐ **Authorship/contributorship** for any manuscript, abstract, or product confirmed and recorded (including CRediT roles)
- ☐ Agreement on how the member will be reached for revisions, submissions, or presentations after departure
- ☐ Preferred name, current email, and ORCID recorded for future correspondence and credit

Access and data

- ☐ Access to restricted datasets removed; **DUA obligations reviewed** (some continue after departure)
- ☐ Removed from platforms as appropriate (project management, code, document storage) *after transfer is verified*
- ☐ Any institution- or sponsor-required exit steps completed — *placeholder: confirm institutional process*
- ☐ Confirmed no protected/identifiable data remains on personal devices

Relationship and growth

- ☐ Exit conversation: what went well, what to improve (Stop/Start/Continue welcome)
- ☐ Discussed references, recommendation letters, and staying in touch

- ☐ Member added to the alumni network and invited to stay connected
 - ☐ Celebrated the member's contributions with the group
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Sign-off

Member: ____ **Date:** ____

Mentor / lead: ____ **Date:** ____

PI: ____ **Date:** ____

Notes / follow-ups:
