

Out of Office/ Vacation Checklist

Whether you're out of the office for a day, for travel or vacation, this checklist will help you stay productive before you leave and when you return!

EMPLOYEE INFORMATION	
Employee Name:	
Vacation/ Out of office Dates:	FROM: _____ TO: _____
Department:	
Emergency Vacation Contact Preference:	<input type="checkbox"/> Email <input type="checkbox"/> Phone <input type="checkbox"/> Text
In case of Emergency how do we contact you? Who can have this information?	
Name of 'Vacation Buddy/Buddies':	
Who is your Direct Manager?	

CHECKLIST:		
<input type="checkbox"/>	Send Detailed Report of current projects to Manager	Outline current status of projects, anything missing, and what needs to be delegated?
<input type="checkbox"/>	Schedule/ Conduct a meeting with 'Vacation Buddy/ Buddies'	Schedule a meeting to discuss and delegate current projects that cannot be put on hold while away, and responsibilities that need to be taken on by 'Vacation Buddy'. Answer: <ul style="list-style-type: none"> • Have you brought your Buddy up to speed on projects/ responsibilities that will be transferred to them to take care of? • Does your buddy have access to all the resources they need to cover for you, do they know where they are and how to access them? • Do you need to share passwords for social media outlets, do they need access to specific materials/programs? • Do they know who to go to with questions?
<input type="checkbox"/>	Send out email reminder 2-3 days before departure reminding close colleagues/ managers when you will be away, and who your vacation buddy is.	Ex: Hi Team, Reminder that I will be away from _ to _ . My vacation buddy/ buddies (name/s) is all up to speed and will be covering for me in the following way. Any questions please reach out to me before ____.
<input type="checkbox"/>	Set/ Turn on "Out of Office Automatic Reply" before leaving	Include the dates you're away from the office, alternative contacts and how often you'll be able to check email.

<input type="checkbox"/>	Make space for Emails/ Voicemails	The longer you're away, the more likely your inbox will fill up—or worst case— stop receiving messages. Clean it up before you leave to maximize space.
<input type="checkbox"/>	Update your voicemail message	<ul style="list-style-type: none"> • Include the dates you're out of the office, alternative contacts and how often you'll be able to check your messages. • If you're taking calls during your travel, set your office phone to forward calls to your cell phone or the temporary number where you can be reached.
<input type="checkbox"/>	Update your calendar	Schedule your time away as an 'Out of Office Appointment' so that colleagues who are scheduling meetings will be able to see you're not on site.
<input type="checkbox"/>	Submit Timesheets/ other relevant materials for Payroll	Prior to departure make sure your timesheets have been submitted so that you will be paid on pay weeks while away.
<input type="checkbox"/>	Clean / Organize workspace	Workspace should be clear and de-cluttered
<input type="checkbox"/>	Schedule Return Meeting	Schedule Return Meeting with your Vacation Buddy/ buddies prior to departure so that upon return you can catch up on what you have missed.