



AGENT OFFBOARDING CHECKLIST

Provide deletion/removal documents to the following:

- Department of Consumer Protection
 - DCP email: dcp.licenseservices@ct.gov
 - <https://portal.ct.gov/DCP/License-Services-Division/All-License-Applications/Real-Estate-License-Change-of-Information>
- REALTOR® Association
 - GHAR phone: (860) 561-1800
 - GHAR email: ghar@gharonline.com
 - https://www.gharonline.com/clientuploads/PDFs/Change_Form.pdf
- SmartMLS Subscription Application and Agreement
 - SmartMLS phone: (203) 750-6000
 - SmartMLS email: membership@smartmls.com
 - https://smartdesk.smartmls.com/hc/article_attachments/360086391471/Member-Delete-Form-3.pdf

Interoffice:

- Determine how agent's current clients will be handled
- Audit of current files
 - Listing Contracts
 - Buyer/Tenant Contracts
 - Pending Sales and/or Rentals
- Disable or transfer access to:
 - Group lists (text, phone, email etc.)
 - Brokerage email
 - Brokerage internal CRM and other internal systems or communication tools
 - Shared drives / Dropbox / Google Drive/Outlook etc.
 - Marketing platforms
 - Website agent profile
 - Remove agent from brokerage website and marketing materials
- Collect any office keys, lockboxes, badges or equipment etc.