STANDARD OPERATING PROCEDURE

Employee Offboarding SOP

Document no.	SOP-ONB-003
Revision	1.0
Owner	HR Manager
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Review cycle	Every 12 months

1. Purpose

To offboard a departing employee smoothly and securely, transferring their knowledge, recovering company property, revoking access on time, and processing final pay accurately.

2. Scope

Applies to voluntary resignations, terminations and retirements. Layoffs affecting multiple roles at once may need additional steps handled with HR and legal counsel.

Definitions

Last day of employment	The final date the employee is actively working or being paid as an active employee, which triggers access revocation.
Knowledge transfer plan	A documented plan for handing off the departing employee's responsibilities, files and open items to others.
Exit interview	A structured conversation with a departing employee to understand their reasons for leaving and gather feedback.

3. Responsibilities

HR Generalist	Runs the offboarding checklist, conducts the exit interview, and updates HR records.
Manager	Plans knowledge transfer, collects company property, and confirms handover of open work.
IT Administrator	Revokes system access and equipment credentials on the last day of employment.
Payroll Specialist	Processes final pay, unused leave payout and any benefits termination correctly and on time.

RACI matrix

Activity	HR Generalist	Manager	IT Administrator	Payroll Specialist
Receive and log departure notice	R/A	C	I	I
Plan knowledge transfer	I	R/A	-	-
Revoke system access	C	C	R/A	-
Process final pay and benefits	C	I	-	R/A
Conduct exit interview	R/A	I	-	-

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Offboarding checklist in the HRIS
- Knowledge transfer plan template
- Company property return log
- Access revocation request form
- Exit interview questionnaire
- Final pay and benefits termination paperwork

5. Procedure

Step	Task	Owner	Done
5.1	**Receive and log the departure notice** The HR generalist logs the resignation, termination or retirement notice, confirms the last day of employment, and starts the offboarding checklist in the HRIS.	HR Generalist	☐
5.2	**Notify IT and payroll** The HR generalist notifies IT and payroll of the departure and the last day of employment as soon as the checklist starts, so access revocation and final pay can be planned.	HR Generalist	☐
5.3	**Plan knowledge transfer** The manager identifies the departing employee's open work, key contacts and files, and builds a knowledge transfer plan assigning items to remaining team members.	Manager	☐
5.4	**Complete knowledge transfer** The departing employee documents ongoing work and walks the receiving team members through open items before their last day, following the knowledge transfer plan. **Checkpoint:** Every open item on the knowledge transfer plan has a named receiving owner before the last day.	Manager	☐
5.5	**Collect company property** The manager collects laptops, badges, keys and any other company property from the employee, logging each item on the property return log.	Manager	☐
5.6	**Revoke system access** The IT administrator disables the employee's accounts, email and system access effective on the last day of employment, following the access revocation request. **Checkpoint:** Access is revoked on the last day of employment, not before knowledge transfer is complete and not delayed past that date.	IT Administrator	☐
5.7	**Redirect email and files** The IT administrator sets up an email auto-response or forwarding as approved by the manager, and moves the departing employee's shared files to the appropriate team location.	IT Administrator	☐
5.8	**Conduct the exit interview** The HR generalist holds an exit interview with the departing employee, using the standard questionnaire to gather feedback on their experience and reasons for leaving.	HR Generalist	☐

Step	Task	Owner	Done
5.9	**Process final pay and benefits** The payroll specialist processes the final paycheck, including any unused leave payout required by policy or law, and coordinates benefits termination or continuation options with the employee. **Checkpoint:** Final pay is calculated and issued within the timeframe required by company policy and local law.	Payroll Specialist	☐
5.10	**Update HR records** The HR generalist updates the employee's record to reflect the separation date and reason, and follows the employee records SOP for retention.	HR Generalist	☐
5.11	**Close the offboarding checklist** The HR generalist confirms every offboarding checklist item is complete, including property return and access revocation confirmation, before closing the record.	HR Generalist	☐

6. Quality checks

- System access is revoked exactly on the last day of employment, confirmed by IT.
- All company property is logged as returned or noted as an exception to follow up.
- Knowledge transfer items have a named receiving owner before the employee leaves.
- Final pay is issued within the timeframe required by policy and local law.

7. Records

- Departure notice and offboarding checklist
- Knowledge transfer plan
- Company property return log
- Exit interview notes and final pay documentation

8. KPIs

- Percentage of access revocations completed on the last day
- Percentage of company property recovered
- Time to process final pay
- Exit interview completion rate

9. Common mistakes

- Revoking access before knowledge transfer and file handover are complete.
- Forgetting to notify IT or payroll until close to the last day.
- Skipping the exit interview for employees who leave on short notice.
- Leaving company property collection to an informal, undocumented process.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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