

Employee Offboarding

Standard Operating Procedure

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Version: 1.0

Effective Date: July 1, 2026

Owner: Human Resources

Company: IssuraDoc (Sample)

SAMPLE — FOR ILLUSTRATION PURPOSES ONLY — IssuraDoc

Purpose	To ensure a consistent, compliant, and professional offboarding experience for all departing employees.
Scope	Applies to all full-time and part-time employees voluntarily or involuntarily separating from the organization.
Owner	Human Resources Department
Review Cycle	Annually or following any regulatory change

1. Purpose & Scope

This Standard Operating Procedure (SOP) establishes the standardized process for offboarding departing employees at IssuraDoc (Sample). The goal is to protect company assets, ensure compliance with applicable employment laws, maintain positive relationships with departing staff, and provide continuity of operations.

This SOP applies to all employees separating from the organization, whether through resignation, termination, retirement, or end of contract.

2. Roles & Responsibilities

2.1 Human Resources

- Initiate the offboarding checklist within 24 hours of receiving notice
- Coordinate final pay and benefits continuation documentation (COBRA, 401k)
- Conduct exit interview and document findings
- Update HRIS and notify relevant departments

2.2 IT Department

- Disable system access on the employee's last day
- Retrieve company-issued devices and document asset return
- Transfer or archive email account per data retention policy
- Revoke third-party application access within 4 business hours of separation

2.3 Direct Manager

- Communicate transition plan to team
- Ensure knowledge transfer is documented
- Collect company property (badges, keys, credit cards)

3. Procedure

Step 1 — Notice Receipt (Day 0)

- HR receives written notice of separation (resignation letter or termination decision)
- HR notifies IT, Payroll, Facilities, and the employee's department head
- Offboarding checklist is opened in HRIS and assigned to relevant owners

Step 2 — Transition Planning (Days 1–5)

- Manager and employee develop a knowledge transfer plan
- Open projects are documented and reassigned
- Client-facing employees: Account management transitions are communicated to affected clients

Step 3 — Final Day Processing

- Employee returns all physical and digital assets
- IT disables all access and retrieves devices
- HR conducts exit interview (30 minutes, voluntary)
- Final paycheck issued per state law requirements
- Separation agreement signed (if applicable)

Step 4 — Post-Departure (Within 5 Business Days)

- HRIS record updated to reflect separation date and type
- Benefits continuation notices sent to employee's home address
- IT archives email and transfers data per retention schedule
- Reference check policy communicated to relevant staff

4. Compliance & Legal Considerations

Final pay must be issued in accordance with applicable state wage laws. California employees must receive final pay on their last day of employment for involuntary separations.

All signed separation agreements must be reviewed by legal counsel prior to execution. COBRA notices must be issued within 14 days of qualifying event.

5. Document Revision History

Version	Date	Author	Change Summary
1.0	July 1, 2026	HR Department	Initial release