

Employee Onboarding and Offboarding Process

Overview

This document outlines the comprehensive process for onboarding new employees and offboarding departing employees, ensuring smooth transitions, compliance with policies, and positive employee experiences.

Purpose

- Standardize onboarding and offboarding procedures across the organization
- Ensure compliance with legal, regulatory, and company policy requirements
- Provide consistent and positive employee experiences
- Maintain security and protect organizational assets
- Support knowledge transfer and business continuity

Employee Onboarding Process

Pre-Arrival Preparation (1-2 weeks before start date)

HR Coordination Tasks

- **Documentation Review:** Verify all hiring paperwork is complete
- **Background Checks:** Ensure all required screenings are cleared
- **System Access Planning:** Coordinate with IT for account creation needs
- **Workspace Preparation:** Arrange desk, equipment, and office supplies
- **Buddy Assignment:** Assign workplace mentor or buddy for new employee

IT System Preparation

- **Account Creation:** Create user accounts in all necessary systems
- **Equipment Allocation:** Assign computer, phone, and other technology
- **Access Provisioning:** Set up appropriate system and application access
- **Security Setup:** Configure security tools and authentication methods
- **Welcome Package:** Prepare IT welcome materials and instructions

Manager Preparation Tasks

- **Schedule Planning:** Plan first week schedule and meetings
- **Project Assignment:** Identify initial projects and responsibilities
- **Team Introduction:** Plan team meetings and introductions
- **Training Plan:** Develop role-specific training schedule
- **Goal Setting:** Prepare initial objectives and expectations

First Day Activities

Welcome and Orientation (Morning)

1. Reception and Welcome:

- Greet new employee and provide welcome materials
- Give office tour and introduce key personnel
- Review building security and safety procedures
- Provide parking and facility access information

2. HR Documentation Session:

- Complete remaining employment paperwork
- Review employee handbook and policies
- Explain benefits enrollment and deadlines
- Set up payroll and direct deposit information
- Review organizational chart and reporting structure

IT Setup and Training (Afternoon)

1. Technology Orientation:

- Provide computer, login credentials, and initial passwords
- Set up email account and communication tools
- Install necessary software and applications
- Configure security settings and multi-factor authentication
- Provide IT support contact information

2. System Training:

- Demonstrate key business applications
- Provide access to knowledge base and self-service tools
- Review IT policies and acceptable use guidelines
- Test all system access and functionality
- Address any technical issues or questions

First Week Integration

Role-Specific Training

- **Job Responsibilities:** Detailed review of position duties and expectations
- **Company Processes:** Training on relevant business processes and workflows
- **Tool Training:** Comprehensive training on job-specific software and tools
- **Safety Training:** Required safety and compliance training sessions
- **Compliance Training:** Mandatory regulatory and policy training modules

Social Integration

- **Team Meetings:** Introduction to immediate team members and colleagues
- **Department Overview:** Understanding of department goals and initiatives
- **Lunch Programs:** Organized lunches with team members and key contacts
- **Mentorship Program:** Regular check-ins with assigned buddy or mentor
- **Q&A Sessions:** Opportunities to ask questions and clarify expectations

30-Day Integration Milestones

- **Performance Check-in:** Initial performance discussion with manager
- **Training Assessment:** Evaluation of training completion and understanding
- **Goal Setting:** Establishment of 90-day and annual objectives
- **Feedback Collection:** Gather feedback on onboarding experience
- **Integration Assessment:** Evaluate social and cultural integration progress

90-Day Review Process

- **Comprehensive Performance Review:** Detailed assessment of job performance
- **Development Planning:** Identify growth opportunities and training needs
- **Feedback Session:** Two-way feedback between employee and manager
- **Adjustment Period:** Address any concerns or needed modifications
- **Permanent Status:** Decision on successful completion of probationary period

Employee Offboarding Process

Departure Notification and Planning

Voluntary Departure Process

1. Resignation Submission:

- Employee submits formal resignation letter
- HR reviews resignation terms and notice period
- Manager and HR plan knowledge transfer strategy
- Begin replacement planning and recruitment process

2. Exit Interview Scheduling:

- Schedule comprehensive exit interview with HR
- Plan knowledge transfer sessions with team members
- Arrange project handover meetings with manager
- Coordinate final performance review if applicable

Involuntary Departure Process

1. Termination Planning:

- HR and legal review termination decision and documentation
- Plan immediate security and access removal procedures
- Coordinate with security for escort and property recovery
- Prepare final paycheck and benefits information

Knowledge Transfer and Handover

Documentation Requirements

- **Project Status Reports:** Current status of all active projects
- **Process Documentation:** Detailed procedures for ongoing responsibilities
- **Contact Lists:** Key relationships and vendor contact information
- **Access Inventory:** List of all systems, accounts, and permissions
- **Outstanding Issues:** Pending problems and recommended solutions

Knowledge Transfer Sessions

1. Team Handover Meetings:

- Review ongoing projects and responsibilities with team
- Transfer institutional knowledge and best practices
- Introduce replacement or interim coverage plans
- Document critical processes and procedures

2. Client/Vendor Transitions:

- Notify external contacts of departure and transition plans
- Introduce replacement contacts and relationship managers
- Transfer account management responsibilities
- Ensure continuity of external relationships

IT Security and Asset Recovery

Account Deactivation Timeline

Immediate Actions (Day of Departure):

- Disable network login and email access
- Revoke VPN and remote access capabilities
- Suspend multi-factor authentication tokens
- Remove access to cloud services and applications

Extended Actions (Within 24 hours):

- Delete or transfer email account per retention policy

- Remove from all security groups and distribution lists
- Disable access to file shares and databases
- Archive user profile and personal files

Final Actions (Within 1 week):

- Complete asset inventory and recovery
- Wipe and redeploy returned equipment
- Update documentation and system records
- Close all related support tickets and accounts

Asset Recovery Process

1. Equipment Inventory:

- Laptop, desktop computer, and monitors
- Mobile devices (phones, tablets, hotspots)
- Peripherals (keyboards, mice, headsets)
- Security tokens and access cards
- Company credit cards and expense accounts

2. Data Handling:

- Backup personal files to shared location
- Transfer business documents to appropriate team members
- Securely wipe personal devices with company data
- Remove company applications from personal devices

Exit Interview and Feedback

Exit Interview Components

1. Job Satisfaction Assessment:

- Evaluation of role fulfillment and job satisfaction
- Assessment of management and team relationships
- Review of professional development opportunities
- Discussion of work environment and culture

2. Improvement Recommendations:

- Suggestions for process and policy improvements
- Feedback on training and development programs
- Recommendations for team and organizational changes
- Input on compensation and benefits programs

Feedback Documentation

- **Structured Interview Form:** Standardized questions and responses
- **Action Items:** Specific improvements to consider implementing
- **Trend Analysis:** Comparison with other exit interview feedback
- **Manager Feedback:** Share relevant feedback with departing employee's manager

Final Administrative Tasks

HR Completion Checklist

- ☐ Final paycheck calculation and processing
- ☐ COBRA benefits notification and enrollment
- ☐ 401(k) and retirement account information
- ☐ Return of company property acknowledgment
- ☐ Non-disclosure and non-compete agreement review
- ☐ Reference policy explanation and contact information

Legal and Compliance Requirements

- **Final Pay Requirements:** Comply with state laws on final paycheck timing
- **Benefit Continuation:** Provide required COBRA and benefit information
- **Documentation Retention:** Maintain employment records per legal requirements
- **Confidentiality Agreements:** Reinforce ongoing confidentiality obligations

Process Documentation and Compliance

Record Keeping Requirements

- **Onboarding Checklists:** Completed forms and training records
- **Exit Documentation:** Exit interviews, asset return forms, final paperwork
- **Training Records:** Completion certificates and assessment results
- **Policy Acknowledgments:** Signed policy and handbook acknowledgments

Compliance Monitoring

- **Equal Employment Opportunity:** Ensure non-discriminatory practices
- **Immigration Compliance:** Verify work authorization documentation
- **Background Check Compliance:** Follow Fair Credit Reporting Act requirements
- **Data Privacy:** Protect personal information per privacy regulations

Quality Assurance and Improvement

Process Metrics

- **Time to Productivity:** Measure how quickly new employees become productive
- **Onboarding Satisfaction:** Survey new employees on onboarding experience
- **Turnover Rates:** Track early turnover and identify improvement opportunities
- **Exit Interview Insights:** Analyze feedback for organizational improvements

Continuous Improvement

- **Regular Process Review:** Quarterly review of onboarding and offboarding procedures
- **Feedback Integration:** Incorporate employee feedback into process improvements
- **Best Practice Updates:** Stay current with industry best practices
- **Technology Enhancement:** Leverage technology to improve efficiency

Technology and Tools

HR Information Systems

- **HRIS Platform:** Workday, BambooHR, or similar system for employee data
- **Applicant Tracking:** Integration with recruitment and hiring systems
- **Training Management:** Learning management system for required training
- **Document Management:** Secure storage for employment documents and records

Collaboration Tools

- **Project Management:** Tools for tracking onboarding tasks and timelines
- **Communication Platforms:** Slack, Teams, or email for coordination
- **Knowledge Management:** Wikis or knowledge bases for process documentation
- **Survey Tools:** Platforms for collecting feedback and satisfaction surveys

Training and Support

Manager Training

- **Onboarding Leadership:** Best practices for welcoming new team members
- **Performance Management:** Setting expectations and providing feedback
- **Legal Compliance:** Understanding employment law and company policies
- **Documentation Skills:** Proper record keeping and performance documentation

HR Team Development

- **Employment Law Updates:** Regular training on legal requirements and changes
- **Customer Service Skills:** Providing excellent service to employees
- **Technology Proficiency:** Effective use of HR systems and tools
- **Conflict Resolution:** Managing difficult situations and employee concerns

Emergency Procedures

Urgent Departure Situations

- **Medical Emergencies:** Procedures for employees unable to complete normal offboarding
- **Security Incidents:** Immediate access removal and asset recovery procedures
- **Legal Issues:** Coordination with legal team for termination-related issues
- **Family Emergencies:** Compassionate handling of unexpected departures

Business Continuity

- **Critical Role Coverage:** Plans for covering essential functions during transitions
- **Knowledge Preservation:** Strategies for capturing and preserving critical knowledge
- **Client Communication:** Templates for notifying clients of personnel changes
- **Vendor Management:** Procedures for transitioning vendor relationships

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