

# Employee Off Boading SOP

## **PURPOSE:**

The purpose of this document is to provide clear procedure, responsibilities and a check list for professional conduct of employee off board.

## **RESPONSIBILITY:**

Under normal circumstance, when an employee is leaving the company, the Hiring manager is the first in line to know; Company HR department will be the second in line to be notified.

- A comprehensive check list will be set up in Notion. Hiring manager to go through the check list and fill in any fields where the situation applies.
- HR will be the check point to make sure the employee off board check list is complete while preparing the termination paperwork.
- HR notify all the concern parties to complete the action points on the check list.
- In a confidential termination situation, whenever possible, HR should notify those who need to take urgent action in one hour advance so resources can be ready, such as IT department.

## **Frequency:**

As needed.

## **Employee Off Board check list:**

1. Shut down employee's access to company's Network / System: (IT)
  - VPN and Splash top.
  - Email
  - Sampro
  - Computer account.
2. Outgoing Employee's communication responsibilities hand off: (IT)

- Dept head to assign another Employee / employees to access the departing employee's Email account.
  - Choose how long the # of months the Email account needs to remain active.
- Dept Manager to assign another Employee / employees to take over phone calls / messages.
  - How long the Phone # remains active: choose # of weeks for the phone line to be active.

Note: Active Email account / Phone lines cost company's money.

3. List any special work-related Applications / Software that company need to regain control, eg: Quick book.
4. List any client portals, web address, username & passwords if having Portal responsibilities.
5. Dept manager to assign a person to review and transfer original docs and decide if all other docs will be deleted.
6. Returning of company's assets: (HR)
  - a. Key to the office (if applicable)
  - b. Company Phone.
  - c. Gas Card ad EZ pass (if applicable).
  - d. Company laptop / tablet.
  - e. Printers / monitors: when work remotely.
  - f. ID Badge
7. Field technicians additional check list:
  - a. Truck (Warehouse)
  - b. Parts on the Truck. (LC / WH)
  - c. Sampro Tech status. (HR)
  - d. All the WOs behind the outgoing Tech. (LC)
8. Communication to concern people: (HR)

- Department heads and concerning personnel who need to take corresponding action.

#### 9. Exit Interview (HR)