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# Offboarding Procedure Guide for Resigned Employees

Purpose: This guide outlines the process for offboarding a user who has resigned and is leaving the BanQsi. It covers account deactivation, device return, and ensuring proper data security before the user leaves.

## Step 1: Initial Offboarding Notification

### Receive Resignation Notification:

* + When an employee submits their resignation, HR should notify IT and relevant departments immediately.
  + HR will communicate the employee's last working day and any additional instructions (e.g., exit interview, data handover).

### Create Offboarding Task in ITSM (IT Service Management):

* + Create an offboarding ticket/task in the ITSM or helpdesk system to track all the actions required during the offboarding process.

## Step 2: Disable User Access

### Disable Email and M365 Access:

* + **Email Account:** Disable the user's email account (e.g., [firstname.lastname@banqsi.com](mailto:firstname.lastname@banqsi.com)) in the **BanQsi domain** Microsoft 365 Admin Center.
    - Change password if needed to prevent access during the offboarding period.
    - Optionally, set an **auto-reply message** in the email account notifying others that the user has left the organization.
  + **Microsoft 365 Account:** Disable the user’s M365 license in the Microsoft 365 Admin Center.
    - Remove access to sensitive resources like OneDrive, SharePoint, and Teams.
  + **Azure AD:** Block sign-ins for the user account in Azure AD if it hasn't been fully disabled.

### Revoke Access to Third-Party Applications:

* + Ensure that the employee's access to any third-party applications or company tools (e.g., HR systems, CRM, internal portals) is disabled.
  + Remove the employee’s access from any privileged accounts or admin tools.

### Multi-Factor Authentication (MFA):

* + Disable MFA or reset any MFA devices associated with the employee’s account to ensure no future access to secured systems.

## Step 3: Data and Device Management

### Back-Up Important Data:

* + Ensure that all important documents, emails, and files from the employee’s devices are backed up or transferred to shared drives or relevant colleagues.
  + Check OneDrive, SharePoint, and any file storage for work-related documents.

### Transfer Ownership of Company Resources:

* + Transfer ownership of any shared files, emails, Teams channels, or projects to other employees or managers.

### Collect and Secure Devices:

* + **Device List:** Review the list of devices issued to the employee, including Surface Laptop, mobile phones, VPN tokens, and any other IT equipment.
  + **Security Software:** Ensure that the employee’s device is up to date with all security patches, antivirus, and encryption tools (e.g., BitLocker).
  + **Device Wipe:** Optionally, if sensitive information is present, you can wipe the device using Intune or another management system to ensure data is securely deleted.

## Step 4: Courier Shipment Label Creation

### Generate Courier Shipment Label:

* + To return company-issued devices (e.g., Surface Laptop), BanQsi admin department create a shipment label and send it to the employee’s personal email for returning the equipment.
  + If already using a specific courier service (e.g., FedEx, UPS), use their system to create a return shipment label.
    - Ensure the label is pre-paid, so the employee does not incur shipping costs.
    - Specify that the label should be attached to the return package containing all company-issued devices and accessories.
    - Include instructions on how to pack and securely ship the devices.

### Steps to Create a Label:

* + Login to your courier service provider’s website (e.g., FedEx, UPS).
  + Select the “Create Return Label” option.
  + Enter the employee's shipping address and confirm the details.
  + Ensure you select **return service** for the employee's specific location.
  + Print or email the return label to the employee's personal email address.

### Send Shipment Label to Employee’s Personal Email:

* + After creating the shipment label, email the label and shipping instructions to the employee’s personal email address. Include:
    - A polite reminder about returning the company devices and any items (charger, accessories, etc.).
    - The pre-paid shipment label to be used for returning the device.
    - A deadline for returning the device (e.g., within 7 days after their last working day).

### Sample Email Template to Send the Label:

Subject: Device Return Instructions - [Employee Name]

Hello [Employee Name],

As part of the offboarding process, we kindly ask that you return all company-issued devices. Please find the pre-paid return shipment label attached to this email.

\*\*Instructions:\*\*

1. Place the company-issued Surface Laptop and any accessories (charger, mouse, etc.) in a secure package.

2. Attach the return shipment label to the package.

3. Drop off the package at your nearest [Courier] location.

Please ensure the package is shipped by [Date], and kindly confirm once it has been returned.

If you have any questions or need further assistance, feel free to reach out.

Best regards,

[BanQsi IT support]

[Contact Information]

## Step 5: Final Account Deactivation and Removal

### Remove the User Account from All Systems:

* + **Deactivation:** After confirming the device has been returned, fully deactivate the user account in all systems (M365, Active Directory, third-party tools).
  + **Archive Data:** Archive important data and emails for record-keeping if necessary.
  + **Remove from Groups:** Remove the user from any distribution lists, teams, or access control groups.

### Revoke Licenses and Final Cleanup:

* + **Revoke Licenses:** Remove any Microsoft 365 and third-party licenses associated with the user.
  + **Cleanup File Shares:** Ensure that any file shares, network drives, or systems the user had access to are cleaned up or reassigned.

## Step 6: Inform HR and Complete Offboarding

### HR Notification:

* + Inform HR that the offboarding process is complete, including the device return and account deactivation.
  + Ensure all required offboarding documentation is signed and archived.

### Exit Interview and Final Feedback (Optional):

* + Conduct an exit interview if required to gather feedback on the employee’s experience and identify areas for improvement.
  + Provide any necessary paperwork (e.g., benefits, severance details).

### Update Systems and Records:

* + Update internal systems (HR, Asset Management, etc.) to reflect the employee’s departure.

## Step 7: Ongoing Monitoring

### Monitor Device Return:

* + Track the return shipment and confirm the device has been received back.
  + If the device is not returned within the specified timeframe, follow up with the employee or escalate as necessary.

### Final Asset Verification:

* + Once the device is returned, verify it is in good condition and ensure that it is securely wiped for reuse or disposal.