Employee Exit Checklist: Offboarding Procedure & IT Asset Recovery

1.0 Policy Objective & Scope

The objective of this policy is to establish a standardized, legally compliant offboarding process for all employees departing from the company, whether voluntarily or involuntarily. This checklist ensures that all administrative, HR, and IT obligations are met in a timely manner, protecting company assets, data, and reputation.

This policy applies to all full-time, part-time, and contract employees across all departments, including office staff, production floor workers, and remote personnel. It is mandatory for HR, IT, and the departing employee's direct supervisor to follow this procedure for every exit.

2.0 Roles & Responsibilities

- **HR Manager:** Initiates the offboarding process, conducts the exit interview, processes final pay and benefits, and ensures all legal documents (e.g., ROE, release forms) are completed.
- **IT Administrator:** Revokes all system access, recovers company hardware and software licenses, wipes personal data from company devices, and archives or deletes user accounts per retention policy.
- **Department Head / Supervisor:** Notifies HR of the departure, collects company property (keys, uniforms, tools), and provides final performance feedback for the exit interview.
- **Finance / Payroll:** Calculates final pay, accrued vacation, and any deductions; issues the Record of Employment (ROE) within the legislated timeframe.
- Security / Facilities (if applicable): Retrieves access badges, parking passes, and ensures the employee is escorted out of the building if required.

3.0 Core Rules & Guidelines

- All offboarding steps must be completed within 24 hours of the employee's last working day to minimize security risks.
- Access revocation (email, ERP, VPN, time clock) must occur before the employee's final departure, not after.
- All company-issued hardware (laptops, phones, tablets, keys) must be physically returned and logged in the IT asset inventory system.
- Personal data on company devices must be wiped in accordance with PIPEDA retention and destruction guidelines; no residual data may remain.
- The exit interview must be conducted in a private setting and documented; notes are stored in the employee's confidential HR file.
- Final pay and the Record of Employment (ROE) must be issued within the legislated provincial timeline (e.g., 5-7 calendar days in Ontario).
- Any non-disclosure or non-compete agreements must be reaffirmed in writing during the exit process.

4.0 Step-by-Step Procedure / Workflow

1. HR receives notice of resignation or termination and creates an offboarding ticket in SwitchDesk, assigning tasks to IT, Finance, and the Department Head.

2. Department Head collects all company property from the employee (keys, badges, uniforms, tools, manuals) and logs the return in the asset tracking system.

3. IT Administrator immediately revokes access to all corporate systems: email, ERP, VPN, file shares, time clock, and any third-party SaaS platforms.

4. IT Administrator schedules a time for the employee to return all company-issued hardware (laptop, phone, peripherals) and performs a secure data wipe using approved software.

5. HR schedules and conducts a confidential exit interview, documenting feedback, reasons for departure, and any unresolved issues.

6. HR prepares the Record of Employment (ROE) and submits it electronically to Service Canada within the required provincial timeline.

7. Finance calculates final pay including accrued vacation, overtime, and any deductions; issues the final payment via direct deposit or cheque on the next regular pay cycle.

8. HR collects signed documents: release of claims, reaffirmation of confidentiality agreements, and any exit acknowledgment forms.

9. IT Administrator archives the employee's email and files to a secure, access-restricted location for the duration of the legal retention period (e.g., 7 years for payroll records).

10. HR updates the employee's status in the HRIS system to 'Inactive' and closes the offboarding ticket in SwitchDesk, attaching all completed checklists and signed documents.

11. Security or Facilities (if applicable) retrieves any remaining access badges and updates the building access control system.

12. HR sends a final confirmation email to the employee summarizing the return of property, final pay details, and benefits termination date.

5.0 Documentation & Compliance

1. All offboarding documentation (exit interview notes, signed release forms, asset return logs) must be stored in the employee's secure digital HR folder within SwitchDesk or the company's HRIS.

2. IT asset recovery logs, including device serial numbers, wipe dates, and software used, must be recorded in the IT asset management system for audit purposes.

3. Access revocation logs (timestamps, systems affected) must be retained for a minimum of 3 years to demonstrate compliance with PIPEDA and internal security policies.

4. A quarterly audit of offboarding records must be conducted by the HR Manager and IT Administrator to ensure all steps were completed and documented.

5. Any data breaches or missed steps discovered during audit must be reported to the Privacy Officer and remediated within 48 hours.