

HR15 · STEP 0 · INTERIM

Offboarding & Exit Interview Capture

## Role-Specific Offboarding Checklist

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Role-tailored offboarding tasks covering access removal, handover, administration, owners, and relative due dates.

### ABOUT THIS DOCUMENT

This is a **sample** deliverable from the **Offboarding & Exit Interview Capture** workflow (HR15) in AGASI AiOS. It shows the expected structure and tone. All names, numbers, and facts are **fictional**.

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# Role-Specific Offboarding Checklist

Prepared by: HR Coordinator, People & Culture — Northbridge Advisory Partners Date: Current offboarding cycle Based on: Offboarding Checklist Template v2.1 + Employee Departure Details

## Employee 1 — Senior Consultant, Data & AI Advisory

Last Working Day: (on file in HRIS / departure details) **Departure Type:** Voluntary — Resignation **Notice Period:** 4 weeks

### IT & Access

#	Task	Owner	Due	Status
A1	Disable Active Directory account	IT Service Desk	On LWD	Pending
A2	Revoke SAP SuccessFactors access	HRIS Administrator	On LWD	Pending
A3	Revoke Client CRM access	IT Service Desk	On LWD	Pending
A4	Remove from SharePoint — Data & AI practice site and Teams channels	Practice Head, Data & AI Advisory	1 calendar day before LWD	Pending
A5	Revoke Azure DevOps repository access	IT Service Desk	On LWD	Pending
A6	Transfer or archive email mailbox	IT Service Desk	On LWD (confirm current archival policy with IT — template references outdated 5-day window; IT now uses 30-day auto-archive)	Pending
A7	Collect laptop (DA-2291), second monitor, access badge	IT Service Desk	On LWD	Pending
A8	Deactivate building access badge	Facilities	On LWD	Pending
A9	Revoke Power BI dashboard access	IT Service Desk	On LWD	Pending

### Knowledge Transfer

#	Task	Owner	Due	Notes
B1	Identify critical client project files for handover (2 active client projects per manager notes)	Senior Consultant + Practice Head	~3 weeks before LWD	Two active engagements require structured handover
B2	Schedule handover sessions — minimum 2 sessions with receiving senior team member	Practice Head, Data & AI Advisory	~2.5 weeks before LWD	Manager flagged need for at least 2 weeks overlap
B3	Update shared documentation, SOPs, and client delivery templates	Senior Consultant	~3 business days before LWD	
B4	Transfer ownership of Power BI client dashboards	Senior Consultant + Practice Head	~1 week before LWD	
B5	Complete client relationship handover — notify Engagement Lead for each active client	Senior Consultant + Practice Head	~1 week before LWD	Template references "Client Relationship Manager" — Data & AI practice uses "Engagement Lead"

### Administrative & HR

#	Task	Owner	Due	Notes
C1	Process final pay and accrued leave payout	Payroll	Next pay cycle after LWD	
C3	Update HRIS record to "Departed" — correct job grade from legacy C3 to G6 at same time	HRIS Administrator	1 calendar day after LWD	Known data quality issue — grade not refreshed after harmonisation

#	Task	Owner	Due	Notes
C4	Exit interview	HR Coordinator	Completed (date on file in exit record)	
C5	File exit interview notes in employee record	HR Coordinator	~3 business days after LWD	
C6	Notify benefits provider of termination	Compensation Analyst	~3–5 business days after LWD	
C7	Remove from company distribution lists	HR Coordinator	On LWD	

## Compliance

#	Task	Owner	Due	Notes
D1	Confirm return of confidential client materials (physical and digital)	Practice Head + Legal	On LWD	Client-facing role — verify no client data retained on personal devices
D2	Remind of NDA and non-compete obligations — provide signed copy	HR Coordinator	~3 business days before LWD	
D3	Archive project files per Records Management Policy v4.0	Practice Head	~1.5 weeks after LWD	Template referenced v3.1 — current version is v4.0 (current policy publication)
D4	Revoke client site access (if applicable)	Practice Head, Data & AI Advisory	On LWD	Confirm with client admin for any on-site access

## Employee 2 — HRIS Analyst, HR Systems

**Last Working Day:** (on file in HRIS / departure details) **Departure Type:** Voluntary — **Resignation Notice Period:** 4 weeks

## IT & Access

#	Task	Owner	Due	Notes
A1	Disable Active Directory account	IT Service Desk	On LWD	
A2	Revoke SAP SuccessFactors admin access	HRIS Administrator	On LWD	Admin-level access — higher risk; confirm all pending admin tasks are reassigned
A2b	Revoke Workday Sandbox access	HRIS Administrator	On LWD	Dual-platform access due to ongoing migration
A3	Revoke JIRA access	IT Service Desk	On LWD	
A6	Transfer or archive email mailbox	IT Service Desk	On LWD (confirm current archival policy with IT)	
A7	Collect laptop (HS-0847), access badge	IT Service Desk	On LWD	
A8	Deactivate building access badge	Facilities	On LWD	
A9	Revoke Power BI edit access and Internal HR Analytics Portal access	IT Service Desk	On LWD	Edit-level Power BI access — reassign dashboard ownership

## Knowledge Transfer

#	Task	Owner	Due	Notes
B1	Identify critical data migration documentation and system admin procedures	HRIS Analyst + HRIS Administrator	~2 weeks before LWD	Team down to 2 analysts — handover critical for migration continuity
B2	Schedule handover sessions with remaining HRIS team member(s)	HRIS Administrator	~1.5 weeks before LWD	Minimum 3 sessions recommended given migration complexity
B3	Update HRIS admin SOPs and data reconciliation procedures	HRIS Analyst	~3 business days before LWD	Dual-platform reconciliation procedures are undocumented
B4	Transfer ownership of recurring HRIS reports and scheduled extracts	HRIS Analyst + HRIS Administrator	~1 week before LWD	

## Administrative & HR

#	Task	Owner	Due	Notes
C1	Process final pay and accrued leave payout	Payroll	Next pay cycle after LWD	
C3	Update HRIS record to "Departed" status	HRIS Administrator	1 calendar day after LWD	
C4	Exit interview	HR Coordinator	Completed (date on file in exit record)	
C5	File exit interview notes in employee record	HR Coordinator	~3 business days after LWD	
C6	Notify benefits provider of termination	Compensation Analyst	~1 week after LWD	
C7	Remove from company distribution lists	HR Coordinator	On LWD	

## Compliance

#	Task	Owner	Due	Notes
D1	Confirm return of confidential HR data and system credentials	HRIS Administrator + Legal	On LWD	HRIS admin access includes sensitive employee data — verify no local copies retained
D2	Remind of NDA obligations — provide signed copy	HR Coordinator	~3 business days before LWD	
D3	Archive HRIS project files per Records Management Policy v4.0	HRIS Administrator	~1.5 weeks after LWD	

## Employee 3 — Associate Consultant, Risk & Compliance Advisory

**Last Working Day:** (on file in HRIS / departure details) **Departure Type:** Voluntary — Resignation **Notice Period:** 2 weeks (probation period)

## IT & Access

#	Task	Owner	Due	Notes
A1	Disable Active Directory account	IT Service Desk	On LWD	
A3	Revoke Client CRM read-only access	IT Service Desk	On LWD	
A4	Remove from SharePoint — Risk & Compliance practice site	Practice Head, Risk & Compliance Advisory	1 calendar day before LWD	
A6	Transfer or archive email mailbox	IT Service Desk	On LWD	Short tenure — likely minimal mailbox content

#	Task	Owner	Due	Notes
A7	Collect laptop (RC-1103), access badge	IT Service Desk	On LWD	
A8	Deactivate building access badge	Facilities	On LWD	

**Note:** Tasks A2 (SAP SuccessFactors), A5 (code repositories), and A9 (Power BI) not applicable — employee did not have access to these systems per departure details.

### Knowledge Transfer

#	Task	Owner	Due	Notes
B1	Identify any project documentation created during tenure	Associate Consultant + Practice Head	~2 business days before LWD	Short tenure and limited project involvement — handover scope likely minimal
B3	Update any shared documentation contributed to	Associate Consultant	1 calendar day before LWD	

**Note:** Tasks B2 (handover sessions), B4 (dashboard transfer), and B5 (client handover) not applicable given limited tenure and project exposure.

### Administrative & HR

#	Task	Owner	Due	Notes
C1	Process final pay and accrued leave payout	Payroll	Next pay cycle after LWD	
C3	Update HRIS record to "Departed" — note: job grade field is blank; record should be closed as-is with a note	HRIS Administrator	1 calendar day after LWD	Grade was never assigned; probation review did not occur
C4	Exit interview	HR Coordinator	Completed (abbreviated, phone — date on file)	
C5	File exit interview notes in employee record	HR Coordinator	~3 business days after LWD	
C7	Remove from company distribution lists	HR Coordinator	On LWD	

**Note:** Task C6 (benefits provider notification) — confirm whether employee was enrolled in company benefits. Template does not distinguish between employment types; probationary employees on managed-services contracts may not have full benefits enrolment.

### Compliance

#	Task	Owner	Due	Notes
D1	Confirm return of any confidential materials	Practice Head, Risk & Compliance Advisory + Legal	On LWD	
D2	Remind of NDA obligations — provide signed copy	HR Coordinator	1 calendar day before LWD	
D3	Archive any project files per Records Management Policy v4.0	Practice Head, Risk & Compliance Advisory	~1.5 weeks after LWD	