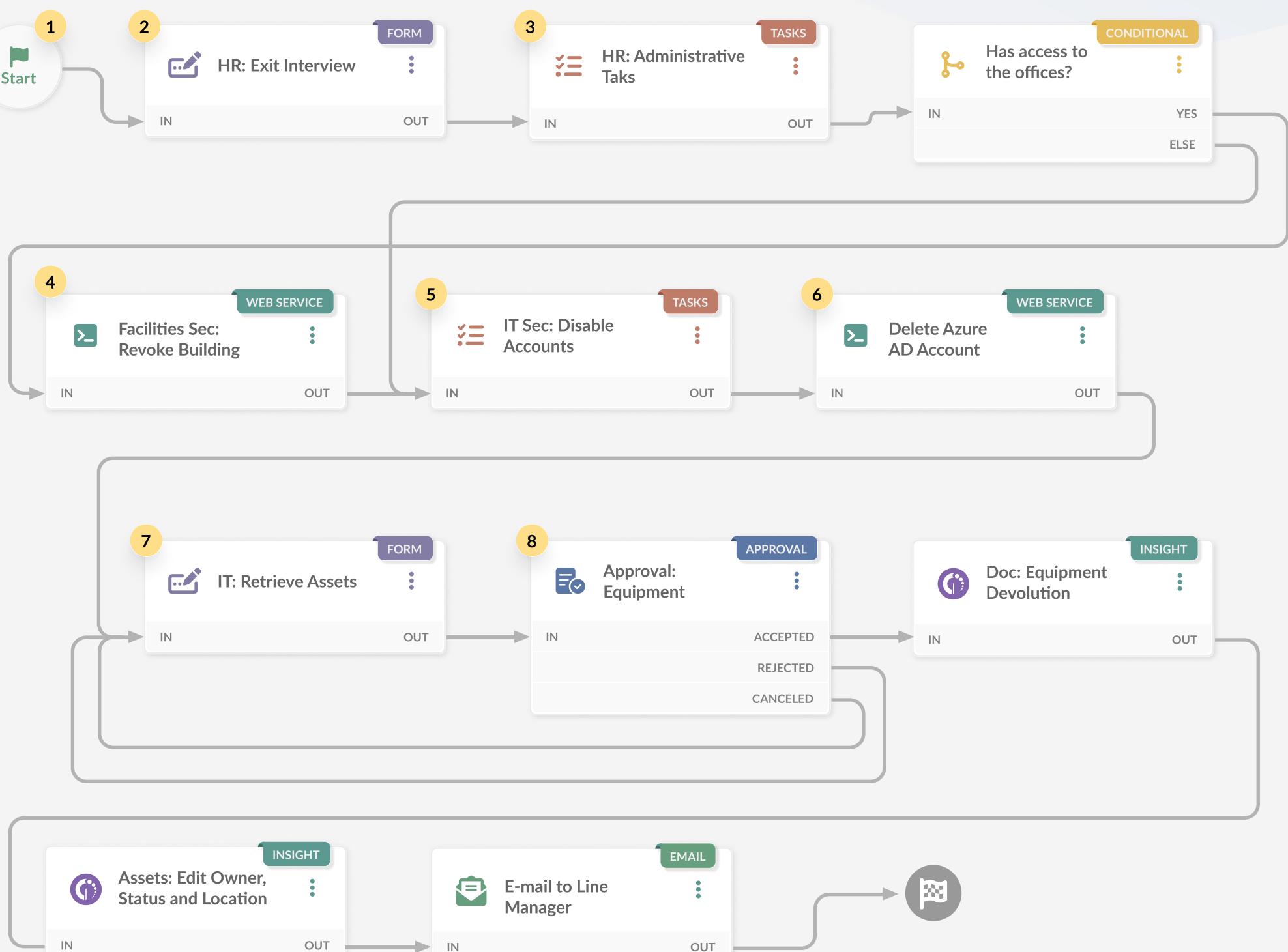


# Employee Offboarding Workflow Template

This workflow template outlines the standard stages of the employee offboarding process. It serves as a practical guide to implement an effective program, but keep in mind to modify and adjust it to your organization's specific processes and guidelines.



Keep in mind that the template was designed vertically for visual purposes, but in the platform you will find it horizontally:



## 1. Start

The process begins when an employee is identified for offboarding. This could be triggered by the employee's resignation, termination, or completion of contract.

## 2. HR - Exit interview

The HR team schedules and conducts an exit interview with the employee. This provides an opportunity to collect feedback on their experience and discuss any outstanding matters like final compensation or benefits.

## 3. HR - Administrative tasks

After the exit interview, HR performs various administrative tasks, such as updating employee records, managing benefits termination, and preparing for the final payroll processing.

## 4. Administrative conditional step

In addition to HR-specific tasks, other departments may need to complete certain administrative actions. In this example, this step introduces a conditional check based on whether the departing employee had physical access to the office (e.g., key cards, biometric access). If the employee had access, the system triggers a task for the facilities or security team to revoke that access.

## 5. IT Security - Disable Accounts

IT security is responsible for disabling the employee's digital accounts, such as email, internal systems, and any external tools tied to the company. This step is essential to maintaining company data security.

## 6. Delete Azure Active Directory Account:

In this step, a web service call is triggered to delete or deactivate the employee's cloud-based accounts, such as Azure Active Directory (but can be other cloud platforms – e.g., Google Workspace, AWS). The system securely connects to the cloud services via API and removes the employee's accounts, ensuring no residual access.

## 7. IT - Retrieve Assets

The IT department initiates the process of retrieving company assets such as laptops, phones, or keycards.

## 8. Approval - Equipment Return

Once the IT team retrieves the assets, the equipment return needs to be formally approved. This approval confirms that all items assigned to the employee have been successfully returned and are in proper condition.

The possible outcomes can be:

- **Accepted:** All assigned equipment has been successfully returned and is in good condition.
- **Rejected/Canceled:** The equipment is returned in damaged condition, or some items are missing. The rejection triggers a notification to the employee or their manager, prompting corrective actions.

## 9. Equipment Devolution

Once the equipment is returned, the IT team documents the devolution of the assets on InvGate Asset Management. The returned assets' details, including ownership, status, and location, are updated in the InvGate Asset Management system.

## 10. Communication to Line Manager

An automated email is sent to the employee's line manager, informing them that the offboarding process is complete and the employee no longer has access to company systems or facilities.

This employee offboarding workflow ensures a smooth transition while securing company resources and information. It involves HR, IT, and Facilities at every necessary step.



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