

Client Training HQ

Offboarding Best Practices

This document is intended to help ensure all offboarding best practices are followed when an employee leaves your organization.

Conduct Exit Interviews

It's always a good idea to make sure prior to your employee leaving the organization that you are fully aware of any and all potential issues which caused the employee to leave. This can be the best way to identify and address any critical issues. Some examples of questions to ask during an exit interview are:

- "What did you like most about working here?"
- "What is your reason for leaving?"
- "What is your intended last day of work?"
- "Did you speak with management regarding any alternatives to leaving such as requesting a leave of absence or transfer?"
- "If you could make any changes, what would you improve about this job?"
- "How did responsibilities and tasks match up with expectations for this job?"
- "Did you have what you needed — equipment, resources, training, and staff — to perform effectively?"
- "What suggestions do you have to make this a better place to work?"

Create and Prepare Documentation

Be sure to get all information in writing, regardless of the separation reason. Include who, what, when, where, and why in your supporting documentation that outlines the reason for separation. Some examples of separation documentation best practices for the two most common types of separation to protest in unemployment matters, which are voluntary quits and involuntary terminations/discharges, are as follows:

Involuntary Separations/Discharges

- Copy of policy violated
- Signed acknowledgement of claimant
- Copies of written warnings- Unless it's a zero-tolerance policy that was violated, the state will need to know that the claimant was warned prior to discharge.
- Supporting final incident documentation such as witness statements or termination notice. Full details of the final incident. Be sure to define who, what, when, where, and why.
- Need to be able to show the employer followed their own policy. For example, the employer didn't allow the employee to work for 2 more weeks when policy calls for immediate termination.

Voluntary Quits

- What reason did the employee give for the resignation?
- Did the employee make an effort to preserve their job?
- Copy of resignation letter, if available. If a resignation letter is not available, a signed document from the individual that the claimant told they resigned, the reason given, and the intended last day worked can also be provided.
- Copy of the exit interview.

Research State Requirements

Many states have requirements regarding what information is provided to separating employees which confirms the separated employee's rights, responsibilities, and requirements for qualifying for unemployment insurance compensation. Be sure that you are following the specific state's guidelines. Some states will provide pamphlets and others require the employer to create a separation notice to the separated employee providing instructions for filing for unemployment benefits. For more state specific information, please reach out to your UC Service Team.

Some examples of potential separation forms are:

- Termination letter
- Severance agreement and/or release of claims
- Required state specific separation forms, if applicable based on location
- Logistical information for returning company-owned equipment
- Consent to receive an electronic W-2
- Benefits information and expectations for COBRA
- Last paycheck information
- A copy of their non-compete and/or non-disclosure agreement
- Retirement, equity, and employee stock information
- Exit interview questions
- Contact information for questions
- Any additional FAQs

Follow an Offboarding Checklist

Most importantly, the use of an offboarding checklist is very useful to ensure that all individuals that are responsible for offboarding an employee have completed all necessary steps. Examples would be disabling any access given to employees, obtaining keys to buildings or passcodes, returning any company owned equipment, and updating records.

Here are a few example checklists:

Human Resource Responsibilities

- ☐ Request a written and signed resignation letter if the employee is resigning.
- ☐ Provide the employee with a timeline of what will happen (returning company assets, exit interview, etc.). Conduct an exit interview to learn how your organization can improve the employee experience.
- ☐ Contact IT to close all employee accounts and change passwords.
- ☐ Confirm when and where company equipment is received.
- ☐ Remove any security access to buildings. Prepare the final paycheck according to state requirements and confirm that the final wages will be ready for the employee, as applicable by state law.
- ☐ Contact insurance carriers to inform them about the benefit terminations.

- ☐ Contact your COBRA administrator, if applicable. Update your company's internal HRIS system, if applicable. Complete the termination in your system of record in accordance with how personnel and confidential files are handled.
- ☐ Prepare and present the appropriate separation forms.

Direct Manager Responsibilities

- ☐ Identify key stakeholders within your organization including managers and key team members that should be aware of the employee's departure.
- ☐ Notify clients, vendors, or any external contacts with which your employee had regular communication. Transition work and responsibilities to prevent gaps in knowledge.
- ☐ Gain access to files including redirecting any email accounts.
- ☐ Update any immediate work schedules to help prevent gaps in coverage.
- ☐ Coordinate with the employee to return of any company property including a laptop, cell phone, and security badge.

More Training is Available!

More Unemployment Compensation for reimbursing training is available on our [Connections](#) site.

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.