

5 Tips to Better Navigating Offboarding Forms

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Employees leave organizations for a variety of reasons - a new job, retirement, or layoffs to name a few. Regardless of the reason, as an employer, it is your job to help ensure their exit is as streamlined as possible for both you and them.

Separation forms must be supplied to separated employees at the time of or after the time of exit. And on top of the state-mandated forms, many employers have their own offboarding forms and notices that need to be delivered, like how to file for COBRA coverage or what to do with equipment. The sheer volume and tumult of all of these forms can create confusion, further administrative burden, and create a disjointed offboarding experience for you and the employee.

This is going to be the last impression the exiting employee may have of your organization and the quality of this experience can impact how they speak of your company and how others may view your brand externally. You want to make sure as they are leaving your organization, they don't have an experience that causes them to not want to maintain that relationship with you.

To help you stay better informed, organized, and prepared to manage and distribute state separation forms and navigate state-specific laws in a smoother fashion, take into consideration the following five tips.



Approximately 1/3rd of corporate alumni maintain relationships with previous employers as clients, partners, or vendors, with 15% of new hires coming from alumni rehires and referrals!



Tip 1

Have a consistent forms process throughout the employee lifecycle



To help you better manage disparate employees, forms, and laws, it is important to have a consistent process and centralized system in place. With the recent changes in remote work, you may have employees in different locations around the state, country, or even world. This has likely made it more challenging to interact with all of your employees especially during the separation process.

Jumping between systems can affect your employees, not only at the time of offboarding, but really throughout their employee life cycle. So, having one consistent system that they are used to going to, receiving forms from, and completing forms in can really help streamline your offboarding process.

Tip 2

*Deliver your
separation forms in
one digital packet*



As your employee is leaving the organization, you want to make it as easy as possible for them to get everything they need in one location. Sending them a notice in one system, instructions on what to do with their equipment in another, and maybe their COBRA information in a completely separate system can be confusing, things get missed, and it's often difficult to track.

Help make it easier on the employee and your team by sending it all out all at one time and in one packet. And when we say one packet, that means one packet every time you send information out to them. Giving them one digital packet with what they need as they're leaving your organization makes it much easier to keep track of what they need to do and helps you as an organization make sure the employee is completing those required tasks and receiving critical information.



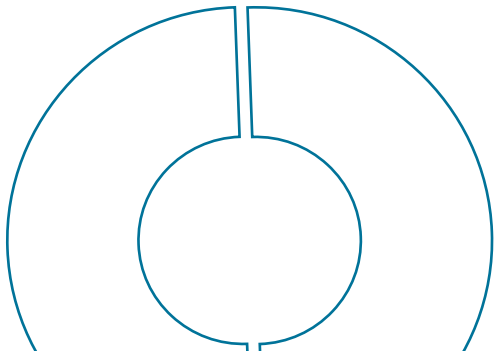
Tip 3

Make sure that your state separation notices are sent within the required time frame



Many of the states have fairly tight timelines to get separation notices to employees. They can range from 24 hours to three days to a week. These short windows can make it challenging for your team to gather the right forms and get them to the exiting employee on time.

These documents tend to contain information that an employee could need at a later time if they're going to file for unemployment insurance benefits. **So, it is critical to have plans and processes in place so you can get the necessary separation forms to the exiting employee within the required timeframe.**



Tip 4

Have everything audit ready in one system



Preparing for an audit can be an extremely time-consuming process if you don't have an easy way to track when forms were sent to an individual. And while you may think an audit is unlikely, something as simple as an EEOC complaint from a former employee could trigger an audit. If it comes out that your former employee should have gotten a specific notice from your company and didn't, it may cause other notices to be reviewed. This can snowball into attracting other areas within the government, including U.S. Immigration and Customs Enforcement (ICE), to take a closer look at your company.

Making sure you have the ability to gather the information you need to respond to an audit easily can be helpful instead of scrambling at the last minute to gather documentation. **With audits often having very quick turnaround times, having the information you need in one system can help ease administrative burden on your team,** especially for something like an EEOC complaint that could span multiple pieces of that employee's time within your organization, across the entire employee life cycle.

Tip 5

Be careful to send the right separation forms to the right employees



The increase in remote workers has made it more cumbersome for employers to be able to distribute notices. In the past, you may have only had to monitor notices in one or two states, because you and your employees were all in the same few brick-and-mortar locations. Now, you may have employees in 15 to 20 different states, and as forms are being added, legislation is changing, and different requirements are being enacted, you still need to be able deliver the right forms to the right individuals.



There is potential for significant penalties if each requirement is not followed. [Learn how a more automated approach](#) to sending out state required separation notices could help you stay on top of these regulatory changes better, provide more detailed audit trails, and help you get the right forms to the right employees at the right time.

¹PeoplePath and Cornell University, Alumni Report Benchmarking Survey, 2019.

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