



Cadenio

HR

Employee Offboarding

Comprehensive offboarding covering notification, access revocation, knowledge transfer, asset recovery, compliance, exit interview, and sign-off.

STEPS	DURATION	APPROVALS	CHECKPOINTS
10	2 days	2	3

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Process steps

1 Initiate offboarding process

Record departure details, notify departments, and create offboarding timeline.

- Employee name text*
- Department text*
- Last working day date
- Departure type dropdown*
- HR notified *
- Manager notified *
- Legal review required

Checkpoint

Due 4h after start

2 Communications plan

Prepare internal and external communication about the departure.

- Team notification plan agreed *
- Client notification needed
- Client notification sent
- Out-of-office / auto-reply configured
- Email forwarding set up

Due 1 day after previous

3 Knowledge transfer

Ensure critical knowledge, projects, and relationships are documented and transferred.

- Knowledge transfer sessions held *
- Projects reassigned *
- Customer relationships transferred
- Documentation updated *
- Pending work reassigned *
- Transfer notes text
- Knowledge transfer document file

Escalate 3 days

4

Revoke system access (IT)

Disable all accounts, tokens, API keys, and physical access.

- Email account disabled *
- SSO/IdP access revoked *
- VPN access removed *
- Code repository access revoked *
- API keys/tokens revoked *
- Third-party SaaS tools multi-choice
- Badge/physical access revoked *

Escalate 1 day

Checkpoint

5

Recover company assets

Collect laptop, phone, keys, and other company property.

- Laptop returned *
- Phone returned *
- Keys/badges returned *
- Credit card returned/cancelled
- Other assets returned text
- Asset return confirmation file

6

Data and IP review

Ensure no company data is on personal devices and IP agreements are confirmed.

- Personal device wiped of company data *
- NDA/IP assignment confirmed *
- Non-compete applicable
- Data concerns text

7

Final payroll and benefits

Process final pay, PTO payout, stock vesting, and benefits termination.

- Final pay calculated *
- PTO balance settled *
- Stock vesting status documented
- Benefits termination date date
- COBRA/continuation notice sent
- Final pay amount confirmed *

Approval

8

Exit interview

Conduct exit interview to collect candid feedback.

Exit interview completed

• Overall satisfaction (1-5)

• Reason for leaving

• Key feedback themes

Would recommend employer

Alumni network interest

*

number

dropdown

text

9

Legal and compliance closure

Ensure all legal obligations are met and compliance records are updated.

Legal hold check completed

Regulatory obligations reviewed

Separation agreement signed

• Signed separation docs

*

file

10

Offboarding completion and sign-off

Confirm all offboarding steps are complete and close the process.

All access revoked (verified)

All assets recovered (verified)

Final pay processed

HR records updated

• Offboarding summary

• HR sign-off

*

*

*

*

file

signature

Approval

Checkpoint

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