

SOP Template: Onboarding and Exit Processing for Staff

This SOP details the **onboarding and exit processing for staff**, covering the steps for new employee orientation, documentation, training requirements, access provisioning, and integration into the team. It also outlines procedures for exit interviews, return of company property, revocation of access rights, final payroll processing, and knowledge transfer to ensure a smooth transition and maintain organizational security and compliance.

1. Scope

This SOP applies to all staff members joining or leaving the organization, including full-time, part-time, and temporary employees.

2. Onboarding Procedures

1. Pre-Onboarding

- Prepare and send offer letter and employment contract.
- Collect signed documents and personal information.
- Schedule orientation and assign onboarding buddy/mentor.

2. First Day Orientation

- Conduct welcome session and office/virtual tour.
- Complete HR paperwork (tax forms, direct deposit, ID verification).
- Provide overview of company policies and code of conduct.

3. Documentation

- Confirm required employment eligibility documents are collected.
- Issue employee handbook and any departmental guidelines.

4. Training & Integration

- Enroll employee in mandatory training programs (compliance, safety, IT security, etc.).
- Set up meetings with team members and stakeholders.

5. Access Provisioning

- Create system user accounts and grant necessary access rights (email, network, applications).
- Distribute company assets (laptop, badge, phone, etc.).

6. Follow-Up

- Conduct check-ins at 1 week, 1 month, and 3 months.
- Gather feedback on onboarding process and adjust as needed.

3. Exit Processing Procedures

1. Notification & Documentation

- Receive resignation letter or initiate termination with proper approvals.
- Confirm last working day and document departure details.

2. Exit Interview

- Schedule and conduct exit interview (HR or supervisor).
- Document feedback for organizational improvement.

3. Company Property Return

- Collect all issued equipment (laptop, phone, access cards, keys, etc.).
- Update asset inventory.

4. Access Revocation

- Disable employee accounts (email, network, applications, physical access).
- Remove or transfer data and reassign responsibilities as needed.

5. **Payroll & Benefits Processing**
 - Process final payroll and outstanding payments (unused leave, bonuses, etc.).
 - Discuss benefits termination or transfer options (healthcare, retirement plans).
6. **Knowledge Transfer**
 - Ensure handover of projects, documentation, and account credentials.
 - Notify relevant departments and clients/stakeholders as appropriate.

4. Responsibilities

Role	Onboarding Responsibilities	Exit Processing Responsibilities
HR	Coordinate orientation, documentation, benefits, and compliance training.	Conduct exit interviews, process final payroll, update records.
IT	Provision accounts and equipment, grant access rights.	Revoke access rights, recover equipment and data.
Manager	Introduce new hires, assign mentors, oversee training/integration.	Coordinate knowledge transfer, reassign tasks.

5. Record Keeping & Compliance

- Maintain all onboarding and exit processing documentation securely for the required statutory period.
- Follow relevant data protection and privacy regulations (e.g., GDPR, HIPAA) regarding employee records.

6. Review and Update

- This SOP should be reviewed annually, or when relevant laws or practices change.