

# SOP Template: Offboarding and Account Termination Process

This SOP details the **offboarding and account termination process**, covering steps for revoking access rights, retrieving company property, conducting exit interviews, ensuring data security, and updating records. The objective is to manage employee departures efficiently while protecting organizational assets and maintaining compliance with internal policies and legal requirements.

## 1. Purpose

Ensure a structured and secure process for terminating employee access, retrieving assets, and updating records upon departure from the organization.

## 2. Scope

Applies to all regular and contract employees, interns, and temporary staff leaving the organization voluntarily or involuntarily.

## 3. Responsibilities

- **HR Department:** Initiate the process, conduct exit interviews, communicate with relevant departments.
- **IT Department:** Revoke access rights, secure data, and recover company devices.
- **Line Manager/Supervisor:** Ensure the return of property, knowledge transfer, and workflow continuity.
- **Employee:** Return all assets and complete exit procedures.

## 4. Procedure

Step	Responsible	Description
1. Notification of Departure	HR / Manager	Formal notification received and shared with relevant departments.
2. Exit Checklist Distribution	HR	Send personalized exit checklist to the departing employee.
3. Revoke Access Rights	IT	Disable access to email, internal systems, and physical premises on or before the last working day.
4. Retrieve Company Property	Manager / IT	Collect ID cards, laptops, phones, keys, credit cards, etc. Inventory to be updated.
5. Conduct Exit Interview	HR	Discuss feedback, reasons for departure, and clarify administrative matters.
6. Ensure Data Security	IT	Secure or transfer work files and ensure deletion of sensitive data per policy.
7. Update Records	HR	Update employee records to reflect termination. Process final payments and benefits.
8. Communicate Departure	HR / Manager	Inform relevant staff, teams, and clients as required.

## 5. Documentation & Records

- Signed resignation/termination letter

- Completed exit checklist
- Exit interview form
- Asset return receipt
- Access revocation logs
- HRIS updates and final payroll records

## **6. Compliance & References**

- Data Protection and Privacy Policy
- IT Security Policy
- Company Asset Management Policy
- Relevant labor laws and regulations

## **7. Review & Revision**

This SOP should be reviewed annually or as required following changes in regulations or company policy.