

Offboarding Email to Initiate Offboarding Process

From: Onboarding Coordinator

Sent:

To: Immediate Supervisor
Logistics Coordinator

CC: Deputy Assistant Secretary
Supervisor
Emergency Preparedness and Safety Coordinator
Training Coordinator
Executive Assistant
HR Liaison
Onboarding Coordinator
Budget Staff
Timekeeper

Subject: OBH Offboarding – Name

The purpose of this email is to inform you that the offboarding process is being initiated for [NAME], who will be leaving OBH effective [DATE].

Offboarding is an administrative process surrounding an employee's exit from an organization once there has been the decision to separate from the agency, and includes managing payments, exit interviews, health insurance, and transfer of work and property. An effective and consistent offboarding process helps to protect the interests of both the agency and existing employees. Offboarding safeguards physical property, ensures compliance and security regarding systems and physical access, and assists in the transfer of knowledge.

The employee's immediate supervisor and the Onboarding Logistics Coordinator play key roles in the offboarding process. A single offboarding checklist has been designed to work in conjunction with the DHH form HR64 –Employee Separation Checklist – that both the supervisor and the Logistics Coordinator will use to facilitate the transition of the employee from active employment to her/his departure date.

Please open and print the checklist, available [here](#), to get started. Once the checklist has been completed and signed by the supervisor and Logistics Coordinator, it will be returned to the OBH Onboarding Coordinator. If you have any special needs or concerns, please don't hesitate to let me know.

Name:
Separation Date:
Cubicle/Office Location:
Supervisor:

OBH Offboarding Checklist

Offboarding is an administrative process surrounding an employee's exit from an organization once there has been the decision to separate from the agency, and includes managing payments, exit interviews, health insurance, and transfer of work and property. An effective and consistent offboarding process helps to protect the interests of both the agency and existing employees. Offboarding safeguards physical property, ensures compliance and security regarding systems and physical access, and assists in the transfer of knowledge.

This checklist is designed to work in conjunction with the [DHH form HR64 – Employee Separation Checklist](#) – that includes important human resources information and agency logistics. The OBH Onboarding Logistics Coordinator also has a key role in the completion of that checklist and must be notified of the employee's last day.

In addition to the Employee Separation Checklist, the OBH offboarding checklist, below, will facilitate the transition of the employee from active employment to her/his departure date.

Employee Name: _____

Date of Separation: _____

Supervisors:

- Schedule meeting with OBH Fiscal Operations on or before the employee's last day of work
- Complete all applicable items on the [DHH form HR64 – Employee Separation Checklist](#) – and provide a copy to the employee
- Verify that work files have been removed from the employee's desktop and/or laptop computers and saved to the OBH K: drive
- Request removal of employee from OBH mailing list
- Provide the [DHH HR65 Exit Survey](#) to the employee

Logistics Coordinator:

- Inventory and/or collect all property and equipment
- Complete Fiscal Operations Equipment Assignment form
- Collect and disable access to Fueltrac card, P-card, and travel card
- Remove employee from Authorized Drivers list
- Update Fiscal Operations Property Master spreadsheet

OBH Offboarding Checklist

- Request removal of computer-related access from IT
 - Email
 - Lync
 - K: drive
 - ISIS/LaGov
 - DHH ALL
 - Other software

- Update OBH telephone directory

- Remove cubicle name sign

- Clean and prepare cubicle or office for next employee

- Equipment removed: _____
Make/Model; S/N; State Tag

Comments:

Logistics Coordinator: _____

Date: _____

Supervisor: _____

Date: _____

This checklist must be signed by the Logistics Coordinator and the supervisor and returned to the OBH Onboarding Coordinator.