



STAFF OFFBOARDING ROUTING FORM

Staff Name

Date

Resignation/Termination Date

Post

Birthday

Note: Always get a resignation in writing from a leaving employee.

Person doing the firing and HR:

INITIAL

DATE

1. Verbal or written letter of resignation received/decision to terminate employee confirmed with COO

2. Figure out who will take over and get the senior involved in the process (Account Managers, Team Leads, etc)

3. **CONDITIONAL:** if being removed immediately ensure IT/HR is coordinated so, concurrent to informing employees they are being terminated ensure all accesses are removed so no damage can be done.

4. **If being terminated:** Inform the employee regarding the termination and the offboarding process.

CONDITIONAL: If local ensure there is a witness when terminating

5. Ask a staff member what other accesses he has and removes

6. Have him transfer all his tasks and assets to his senior

7. Get a list from the staff member of all the tasks that they handle and any open tasks that will require follow up before we pay the last payment





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8. Change G-suite Password and Fwd emails to the respective exec. (Account Managers)

URGENT ACCESS REMOVAL(HR OR I.T.):

INITIAL

DATE

9. Deactivate RingCentral

10. Deactivate from Zoom

11. Delete all LastPass Accesses

12. Remove access on Time Doctor

13. Remove log-in access from CRM

14. Suspend G-Suite email (Coordinate with Senior First)

15. Email Kristopher to remove the picture from our website

SENIOR CONTENT DIRECTOR:

INITIAL

DATE

16. Remove/Deactivate Egnyte access (if shared access get the account holder to change the password)

17. Remove from Trello

18. Removes access to any other tools and confidential documents shared with the staff: - Adobe Apps - Freepik - Envato Elements - Egnyte - Descript

19. Ensure that the senior is aware, and removes access to any other tools and confidential documents shared to the staff





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Senior (To be verified by HR or I.T.)

INITIAL

DATE

21. **LOCAL ONLY:** Check-in work tools in Sortly

22. Remove access to Seller Central (Amazon)

23. Remove Business Manager Access (Paid Ads)

24. **REMOTE ONLY:** Remove social media access/Change passwords

25. Remove them from the Business Manager.

Finance

26. Remove on AGM Staff Salary spreadsheet

26. **US ONLY:** Remove from Gusto Payroll

HR- After Fired/Quit:

27. Log into CRM and print any Disciplinary Documentation and file in their physical folder

28. Delete from CRM

29. Print and file resignation if quitting.

30. **US ONLY:** Report Separation of Child Support Services for Employees

31. Remove them from the Bday calendar

32. Add to HR calendar if departing staff is an Account Manager - 6 months after they are off-boarded check with Jorge to see if the email can be deleted

33. Move physical folder to "ex-staff" folder

