

## # Role-Specific Offboarding Checklist

Prepared by: HR Coordinator, People & Culture — Northbridge Advisory Partners Date: 2026-04-01 Based on: Offboarding Checklist Template v2.1 + Employee Departure Details

### Employee 1 — Senior Consultant, Data & AI Advisory

**Last Working Day:** 2026-04-11 **Departure Type:** Voluntary — Resignation **Notice Period:** 4 weeks

#### IT & Access

#	Task	Owner	Due	Status
A1	Disable Active Directory account	IT Service Desk	2026-04-11	Pending
A2	Revoke SAP SuccessFactors access	HRIS Administrator	2026-04-11	Pending
A3	Revoke Client CRM access	IT Service Desk	2026-04-11	Pending
A4	Remove from SharePoint — Data & AI practice site and Teams channels	Practice Head, Data & AI Advisory	2026-04-10	Pending
A5	Revoke Azure DevOps repository access	IT Service Desk	2026-04-11	Pending
A6	Transfer or archive email mailbox	IT Service Desk	2026-04-11 (confirm current archival policy with IT — template references outdated 5-day window; IT now uses 30-day auto-archive)	Pending
A7	Collect laptop (DA-2291), second monitor, access badge	IT Service Desk	2026-04-11	Pending
A8	Deactivate building access badge	Facilities	2026-04-11	Pending
A9	Revoke Power BI dashboard access	IT Service Desk	2026-04-11	Pending

#### Knowledge Transfer

#	Task	Owner	Due	Notes
B1	Identify critical client project files for handover (2 active client projects per manager notes)	Senior Consultant + Practice Head	2026-03-21	Two active engagements require structured handover
B2	Schedule handover sessions — minimum 2 sessions with receiving senior team member	Practice Head, Data & AI Advisory	2026-03-24	Manager flagged need for at least 2 weeks overlap
B3	Update shared documentation, SOPs, and client delivery templates	Senior Consultant	2026-04-08	
B4	Transfer ownership of Power BI client dashboards	Senior Consultant + Practice Head	2026-04-04	
B5	Complete client relationship handover — notify Engagement Lead for each active client	Senior Consultant + Practice Head	2026-04-04	Template references "Client Relationship Manager" — Data & AI practice uses "Engagement Lead"

## Administrative & HR

#	Task	Owner	Due	Notes
C1	Process final pay and accrued leave payout	Payroll	Next pay cycle after 2026-04-11	
C3	Update HRIS record to "Departed" — correct job grade from legacy C3 to G6 at same time	HRIS Administrator	2026-04-12	Known data quality issue — grade not refreshed after 2025 harmonisation
C4	Exit interview	HR Coordinator	Completed 2026-03-26	
C5	File exit interview notes in employee record	HR Coordinator	2026-04-14	
C6	Notify benefits provider of termination	Compensation Analyst	2026-04-16	
C7	Remove from company distribution lists	HR Coordinator	2026-04-11	

## Compliance

#	Task	Owner	Due	Notes
D1	Confirm return of confidential client materials (physical and digital)	Practice Head + Legal	2026-04-11	Client-facing role — verify no client data retained on personal devices
D2	Remind of NDA and non-compete obligations — provide signed copy	HR Coordinator	2026-04-08	
D3	Archive project files per Records Management Policy v4.0	Practice Head	2026-04-21	Template referenced v3.1 — current version is v4.0 (updated Jan 2026)
D4	Revoke client site access (if applicable)	Practice Head, Data & AI Advisory	2026-04-11	Confirm with client admin for any on-site access

## Employee 2 — HRIS Analyst, HR Systems

**Last Working Day:** 2026-04-18 **Departure Type:** Voluntary — Resignation **Notice Period:** 4 weeks

## IT & Access

#	Task	Owner	Due	Notes
A1	Disable Active Directory account	IT Service Desk	2026-04-18	
A2	Revoke SAP SuccessFactors admin access	HRIS Administrator	2026-04-18	Admin-level access — higher risk; confirm all pending admin tasks are reassigned
A2b	Revoke Workday Sandbox access	HRIS Administrator	2026-04-18	Dual-platform access due to ongoing migration
A3	Revoke JIRA access	IT Service Desk	2026-04-18	
A6	Transfer or archive email mailbox	IT Service Desk	2026-04-18 (confirm current archival policy with IT)	
A7	Collect laptop (HS-0847), access badge	IT Service Desk	2026-04-18	
A8	Deactivate building access badge	Facilities	2026-04-18	
A9	Revoke Power BI edit access and Internal HR Analytics Portal access	IT Service Desk	2026-04-18	Edit-level Power BI access — reassign dashboard ownership

## Knowledge Transfer

#	Task	Owner	Due	Notes
B1	Identify critical data migration documentation and system admin procedures	HRIS Analyst + HRIS Administrator	2026-04-04	Team down to 2 analysts — handover critical for migration continuity
B2	Schedule handover sessions with remaining HRIS team member(s)	HRIS Administrator	2026-04-07	Minimum 3 sessions recommended given migration complexity
B3	Update HRIS admin SOPs and data reconciliation procedures	HRIS Analyst	2026-04-15	Dual-platform reconciliation procedures are undocumented
B4	Transfer ownership of recurring HRIS reports and scheduled extracts	HRIS Analyst + HRIS Administrator	2026-04-11	

## Administrative & HR

#	Task	Owner	Due	Notes
C1	Process final pay and accrued leave payout	Payroll	Next pay cycle after 2026-04-18	
C3	Update HRIS record to "Departed" status	HRIS Administrator	2026-04-19	
C4	Exit interview	HR Coordinator	Completed 2026-03-31	
C5	File exit interview notes in employee record	HR Coordinator	2026-04-21	
C6	Notify benefits provider of termination	Compensation Analyst	2026-04-23	
C7	Remove from company distribution lists	HR Coordinator	2026-04-18	

## Compliance

#	Task	Owner	Due	Notes
D1	Confirm return of confidential HR data and system credentials	HRIS Administrator + Legal	2026-04-18	HRIS admin access includes sensitive employee data — verify no local copies retained
D2	Remind of NDA obligations — provide signed copy	HR Coordinator	2026-04-15	
D3	Archive HRIS project files per Records Management Policy v4.0	HRIS Administrator	2026-04-28	

## Employee 3 — Associate Consultant, Risk & Compliance Advisory

**Last Working Day:** 2026-04-04 **Departure Type:** Voluntary — Resignation **Notice Period:** 2 weeks (probation period)

### IT & Access

#	Task	Owner	Due	Notes
A1	Disable Active Directory account	IT Service Desk	2026-04-04	
A3	Revoke Client CRM read-only access	IT Service Desk	2026-04-04	
A4	Remove from SharePoint — Risk & Compliance practice site	Practice Head, Risk & Compliance Advisory	2026-04-03	
A6	Transfer or archive email mailbox	IT Service Desk	2026-04-04	Short tenure — likely minimal mailbox content
A7	Collect laptop (RC-1103), access badge	IT Service Desk	2026-04-04	
A8	Deactivate building access badge	Facilities	2026-04-04	

**Note:** Tasks A2 (SAP SuccessFactors), A5 (code repositories), and A9 (Power BI) not applicable — employee did not have access to these systems per departure details.

### Knowledge Transfer

#	Task	Owner	Due	Notes
B1	Identify any project documentation created during tenure	Associate Consultant + Practice Head	2026-04-02	Short tenure and limited project involvement — handover scope likely minimal
B3	Update any shared documentation contributed to	Associate Consultant	2026-04-03	

**Note:** Tasks B2 (handover sessions), B4 (dashboard transfer), and B5 (client handover) not applicable given limited tenure and project exposure.

## Administrative & HR

#	Task	Owner	Due	Notes
C1	Process final pay and accrued leave payout	Payroll	Next pay cycle after 2026-04-04	
C3	Update HRIS record to "Departed" — note: job grade field is blank; record should be closed as-is with a note	HRIS Administrator	2026-04-05	Grade was never assigned; probation review did not occur
C4	Exit interview	HR Coordinator	Completed 2026-04-02 (abbreviated, phone format)	
C5	File exit interview notes in employee record	HR Coordinator	2026-04-07	
C7	Remove from company distribution lists	HR Coordinator	2026-04-04	

**Note:** Task C6 (benefits provider notification) — confirm whether employee was enrolled in company benefits. Template does not distinguish between employment types; probationary employees on managed-services contracts may not have full benefits enrolment.

## Compliance

#	Task	Owner	Due	Notes
D1	Confirm return of any confidential materials	Practice Head, Risk & Compliance Advisory + Legal	2026-04-04	
D2	Remind of NDA obligations — provide signed copy	HR Coordinator	2026-04-03	
D3	Archive any project files per Records Management Policy v4.0	Practice Head, Risk & Compliance Advisory	2026-04-14	

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AGASI AiOS — Sample material. For illustrative purposes. All data is fictional.