Offboarding administration

Process Definition Document (PDD): template and worked example

Example company (fictional): Ferrante & Bianchi Assicurazioni Brokers S.r.l., an insurance broker in Bologna, Italy (85 employees).

Document control

Field	Value
Process name	Offboarding administration
Process owner	[Name, role]
Prepared by	[Name]
Reviewed by	[Names of the people who do the work]
Approved by	[Name, date]
Version	1.0 (as-is)
Status	Draft

How to use this template

This is a complete process definition document (PDD) for offboarding administration, also called employee exit administration, leaver process or termination checklist. It covers the administrative work that starts once an employee's last working day is confirmed: removing access, collecting equipment, closing expenses and handing the payroll data to the external provider. The company is fictional, but the steps are the ones most small and mid-sized offices run through every time someone leaves.

Use it as a starting point. Replace the company details, keep the sections, and walk through each step with HR, IT and whoever prepares the final payroll data. Most companies change the payroll cut-off date, the list of external portals that need deactivation and the number of days they allow for equipment return. The decision to end employment, notice periods and reasons are deliberately outside this document.

- Replace the company, the systems and the provider with yours. If HR and IT share one ticketing tool, merge steps 2 and 3.
- Set your own payroll cut-off date in step 18. It is the date that decides whether a leaver is paid this month or next.
- List every external portal your people use, not only insurer portals. Each one needs a named owner who can request deactivation.
- Decide who may approve same-day access removal for immediate departures, and write the name down before you need it.
- Check the handover step with managers. Mailbox and file ownership is where most delays and data loss happen.

1. Purpose and scope

This procedure describes the administrative steps at Ferrante & Bianchi Assicurazioni Brokers S.r.l. after an employee's departure is formally confirmed. It runs from the moment HR records the last working day to the moment access is removed, equipment is back and the payroll data package is with the external payroll provider. It gives HR, IT, the office manager and the accountant one shared checklist, so that nobody keeps access they should not have, no equipment goes missing and the final payslip is calculated on correct data.

In scope

- Employees leaving for any reason once the last working day is confirmed, including fixed-term endings
- Removal of system access and conversion of the mailbox

- Return, check and wipe of laptop, phone and accessories
- Collection of badge, keys and company card
- Final expense claims, leave balance and overtime
- The payroll data package for the external provider

Out of scope

- The decision to end employment, notice periods and reasons
- Client files and policy handling, except mailbox and document handover
- Calculation of the final payslip, which the payroll provider does

2. Process at a glance

Item	Description
Trigger	HR records a confirmed last working day for a departing employee.
Starts when	The HR Administrator records the last day in Zucchetti HR.
Ends when	HR confirms all checklist items are closed, archives the checklist and closes the case.
Inputs	Confirmed last working day, Line manager confirmation of mailbox and file handover, Returned equipment, badge, keys and company card, Last expense claims and card statement, Leave balance and overtime from Zucchetti HR
Outputs	Disabled accounts and shared mailbox, Wiped devices set to available, Blocked company card, Payroll data package approved and uploaded, Archived offboarding checklist
Volume	About 20 cases a year, including fixed-term endings
Working hours	Monday to Friday, 08:30 to 17:30. The target is to finish within 5 working days of the last day, and payroll data must reach the provider by the 20th of the month.

3. Roles and responsibilities

Role	Responsibilities
HR Administrator	Records the last day, opens the checklist, assigns tasks, chases late replies, exports leave and overtime, and closes and archives the case.
Line Manager	Confirms who takes over the mailbox and shared files, and receives the equipment from the departing employee.
IT Administrator	Opens the ticket, checks equipment against the asset list, disables accounts, converts the mailbox, wipes devices and asks insurers to deactivate portal users.
Office Manager	Collects the badge, keys and company card, and blocks the card in the banking portal.
Back Office Accountant	Collects final expense claims, checks them against the card statement, completes the payroll package and uploads it to the provider.
Head of Administration	Reviews and approves the payroll package before upload, and approves same-day access removal for immediate departures.
Payroll Provider (external)	Receives the payroll data package, asks questions where needed and calculates the final payslip.

4. Systems

- Zucchetti HR: master data, leave balances and overtime
- Microsoft 365 and Entra ID: accounts, groups and mailboxes
- Freshservice: tickets and asset list
- Excel offboarding checklist on SharePoint
- Email inbox (hr@) and the provider's secure upload portal
- Banking portal for company cards

5. Process map

Process diagram goes here

Draw one lane per role from section 3, the steps from section 6 in order, and a diamond for each decision in section 7.

6. Procedure, step by step

#	Step	Who	What happens	System	Output
1	Record the last working day	HR Administrator	Records the confirmed last working day in Zucchetti HR. This takes about 5 minutes.	Zucchetti HR	Last day in the HR record
2	Open the checklist and assign tasks	HR Administrator	Creates a row in the Excel checklist and emails tasks to the manager, IT, the office manager and the accountant. This takes 15 to 20 minutes.	Excel, Outlook	Checklist row and task emails
3	Open the IT ticket	IT Administrator	Opens a ticket, copying the last day by hand from the email. This takes about 5 minutes.	Freshservice	Freshservice ticket
4	Confirm mailbox and file handover	Line Manager	Confirms by email who takes over the mailbox and shared files. If there is no reply within 3 working days, HR chases by phone. This happens in about 35% of cases.	Outlook	Named successor for mailbox and files
5	Receive the equipment	Line Manager	Receives laptop, phone and accessories from the employee by the last day.	Paper, in person	Equipment with the manager
6	Report missing or damaged items	Line Manager	If equipment is missing or damaged, informs the office manager and IT, and a cost note goes to the accountant. This happens in about 12% of cases.	Outlook	Cost note, or equipment accepted
7	Check the equipment	IT Administrator	Checks the returned items against the Freshservice asset list. This takes about 10 minutes.	Freshservice	Verified asset list
8	Disable the account	IT Administrator	On the evening of the last day, disables the Entra ID account and removes group memberships. This takes 20 to 30 minutes.	Entra ID	Disabled account
9	Convert the mailbox	IT Administrator	Converts the mailbox to a shared mailbox for the manager, with an automatic reply for 30 days. This takes about 10 minutes.	Microsoft 365	Shared mailbox with auto-reply
10	Wipe the devices	IT Administrator	Wipes the laptop and the phone and sets the asset to available. This takes 30 to 45 minutes.	Freshservice	Wiped devices, assets available
11	Deactivate insurer portal users	IT Administrator	If the employee used insurer portals (about 40% of cases), asks each insurer's support to deactivate the user. This takes 1 to 5 days. Otherwise the step is skipped.	Email, insurer portals	Portal users deactivated
12	Collect badge, keys and card	Office Manager	Collects the badge, keys and company card, and blocks the card in the banking portal. This takes about 15 minutes.	Banking portal	Items collected, card blocked
13	Check final expenses	Back Office Accountant	Collects the last expense claims and checks them against the card statement. This takes 30 to 40 minutes.	Excel, banking portal	Reconciled expenses

#	Step	Who	What happens	System	Output
14	List deductions	Back Office Accountant	If there are unclaimed card items or unpaid advances, lists them as deductions. This happens in about 15% of cases.	Excel	Deductions list, or none
15	Export leave and overtime	HR Administrator	Exports the leave balance and overtime from Zucchetti HR into the payroll data sheet. This takes 10 to 15 minutes.	Zucchetti HR	Leave and overtime data
16	Complete the payroll package	Back Office Accountant	Completes the payroll package from the leave data, overtime, expenses and deductions. This takes 40 to 60 minutes.	Excel	Draft payroll package
17	Review and approve the package	Head of Administration	Reviews and approves by email. If the figures do not match the leave records, the accountant corrects and resubmits. This rework loop affects about 20% of cases.	Outlook	Approved payroll package
18	Upload to the provider	Back Office Accountant	Uploads the approved package to the provider's secure portal before the 20th of the month.	Provider portal	Package uploaded
19	Acknowledge and calculate	Payroll Provider	Acknowledges the package within 1 to 2 days. If it has questions (about 25% of cases), the accountant answers by email. Otherwise the payslip is calculated.	Provider portal, email	Acknowledgement, final payslip
20	Close and archive	HR Administrator	Confirms that all checklist items are closed, archives the checklist and closes the case. This takes about 10 minutes.	Excel, SharePoint	Closed and archived case

7. Decision points and business rules

- Has the line manager replied within 3 working days? No: HR chases by phone (step 4). About 35% of cases.
- Is any equipment missing or damaged? Yes: the manager informs the office manager and IT, and a cost note goes to the accountant (step 6). About 12% of cases.
- Did the employee use insurer portals? Yes: IT asks each insurer to deactivate the user, which takes 1 to 5 days (step 11). About 40% of cases.
- Are there unclaimed card items or unpaid advances? Yes: the accountant lists them as deductions (step 14). About 15% of cases.
- Do the payroll figures match the leave records? No: the accountant corrects and resubmits (step 17). About 20% of cases.
- Does the payroll provider have questions? Yes: the accountant answers by email before the payslip is calculated (step 19). About 25% of cases.

8. Exceptions

- Last day changes after opening (about 10% of cases): HR updates all tasks and informs IT and the accountant.
- Immediate departure without handover (about 8%): IT disables access the same day with approval from the Head of Administration.
- Equipment returned late or by courier (about 15%): the case stays open until the equipment is received.
- Departure after the 20th (about 25%): the package goes into the next month's run.

9. Controls

- The Head of Administration approves the payroll package before upload.
- IT confirms access removal in Freshservice, separately from HR.
- The company card is blocked on the last day, with a record in the banking portal.

- Payroll data goes only through the secure portal, in line with GDPR.
- The checklist is archived for the statutory retention period.

10. Known issues today

- The last day is retyped into the checklist and into Freshservice, and the dates sometimes differ.
- Managers reply late, so IT waits before converting the mailbox.
- Insurer portal deactivation depends on third parties and exceeds the target.
- Leave balances are rechecked by hand because Zucchetti HR and the provider count differently.
- Several people edit the Excel checklist by email.

11. RACI matrix

R = responsible (does the work), A = accountable (owns the outcome), C = consulted, I = informed.

Activity	HR	Line Manager	IT	Office Manager	Accountant	Head of Admin
Open the case and assign tasks	A/R	I	I	I	I	
Confirm mailbox and file handover	C	A/R	I			
Receive and check equipment	I	R	A	C	I	
Remove access and wipe devices	I	C	A/R			I
Collect badge, keys and card	I			A/R	I	
Check final expenses and leave	R				A	
Approve the payroll package	C				R	A
Upload and close the case	A				R	I

12. KPIs

KPI	Definition	Target
Days from last day to all access removed	Working days between the last working day and the confirmation in Freshservice that all accounts and portal users are disabled. Target 1.	[set]
Days from last day to payroll package uploaded	Working days between the last working day and the upload of the approved package to the provider.	[set]
Packages sent back for correction	Share of payroll packages returned by the Head of Administration or the provider for wrong figures.	[set]
Equipment returned complete and on time	Share of leavers who return all items by the last day.	[set]
Open cases older than 10 working days	Number of offboarding cases still open 10 working days after the last day, counted monthly.	[set]

13. Revision history

Version	Date	Author	Change
1.0	[date]	[name]	First as-is version

Free template from processfix.ai. You may copy and adapt it. The company in the example is fictional.