Offboarding

Exit pipelines, resignation letters, and what moving someone to Archived does.

- How offboarding works

How offboarding works

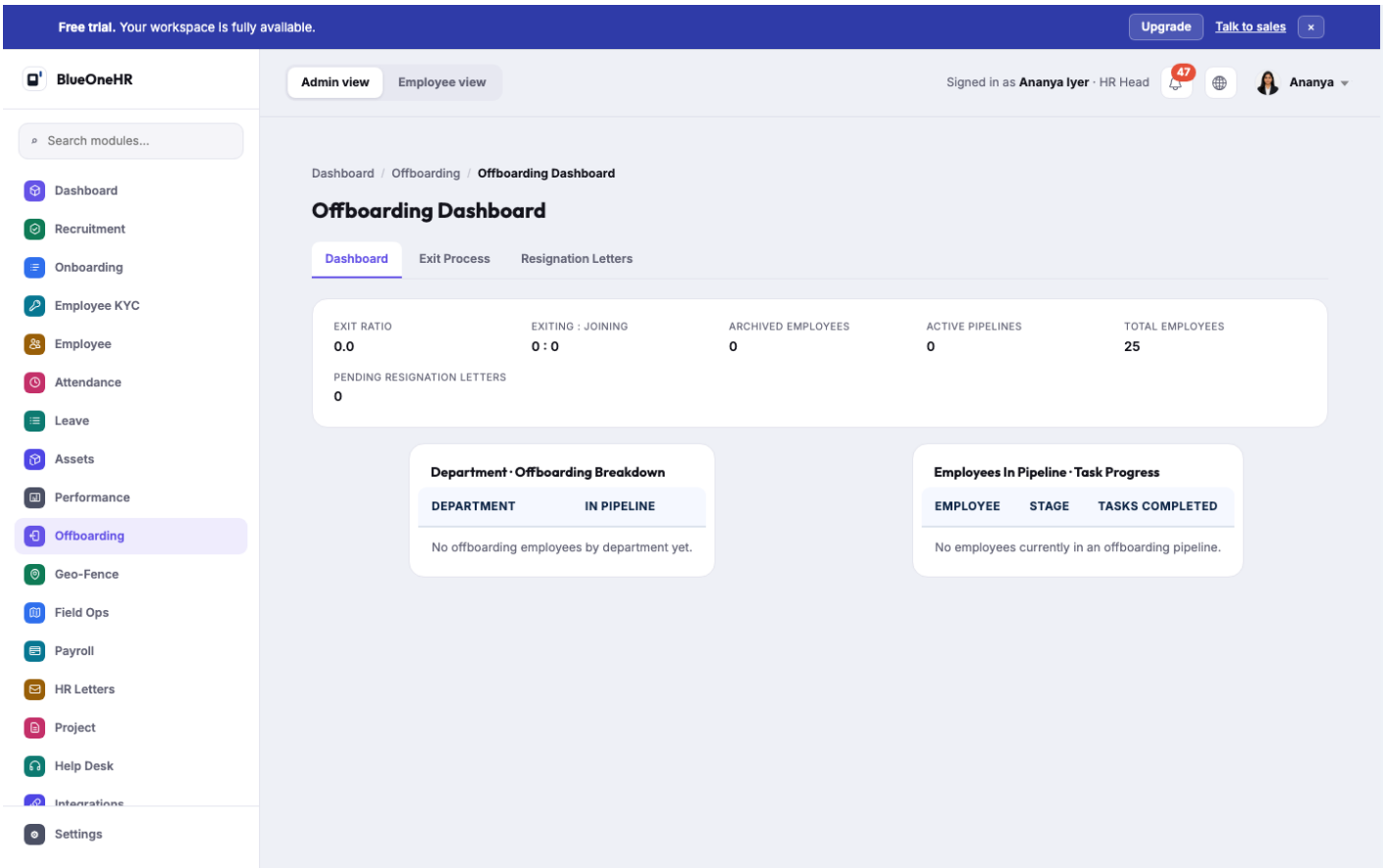
Offboarding manages people leaving. It has three screens: a **Dashboard**, **Exit Process** (the pipelines that walk each leaver through their notice period, handover and final settlement) and **Resignation Letters**. One thing in it changes an employee's account, so read the section on the **Archived** stage before you use it.

Before you start

- Viewing needs permission on the Offboarding module. Creating and changing pipelines, stages, tasks and letter decisions need their own permissions. A person named as a manager of an offboarding pipeline, stage or task can also work the pipeline they manage.
- **Resignation Letters** only works when the **Resignation Request** setting is on. When it is off the page says so and hides the create button. It was on in the test workspace used for this page. Where an administrator turns it on was not confirmed.
- The people listed in pipelines are real employee records. Do not experiment on a real workspace.

The screens

Dashboard



Six figures and two tables. **Exit ratio** is archived employees divided by all employees. **Exiting : Joining** compares people in resignation with people currently being onboarded. The others are **Archived employees**, **Active pipelines**, **Total employees** and **Pending resignation letters**. The tables are **Department · Offboarding Breakdown** (people in a pipeline by department) and **Employees In Pipeline · Task Progress** (each person's stage and tasks completed). With no pipelines, both tables are empty.

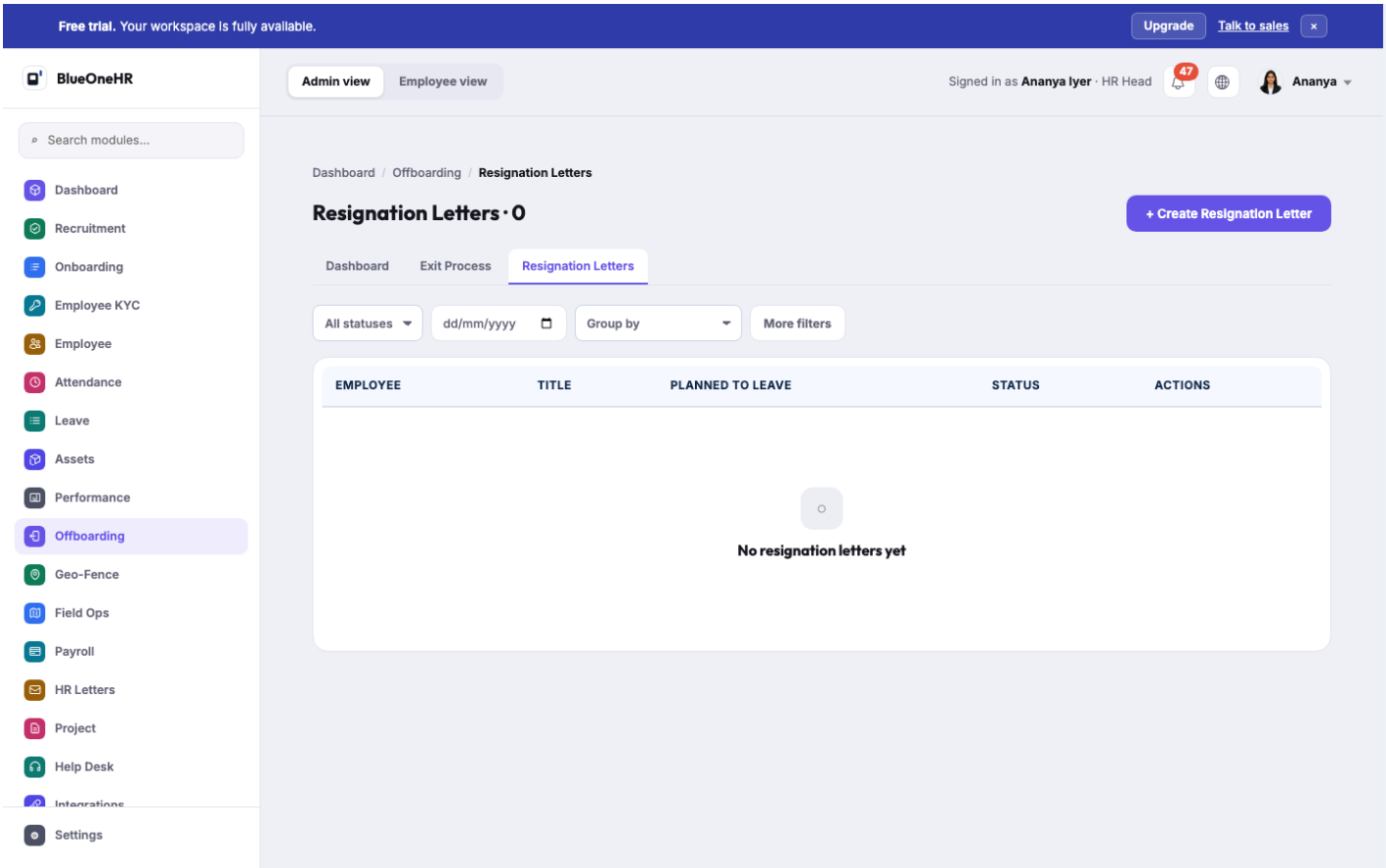
Exit Process

The list of pipelines. Each row has the pipeline, its status, its stages, how many employees are in it, its managers and its actions. **+ Create Pipeline** opens a form with **Title**, **Description** and **Managers** (all required), **Status** (**Ongoing** or **Completed**) and **Company**. Saving a pipeline creates its first stage for you, called **Notice Period**.

Opening a pipeline shows its stages, with the employees in each. A stage has a **Title**, a **Type** and **Managers**. The types are **Notice period**, **FnF Settlement**, **Other**, **Interview**, **Work handover** and **Archived**. You add an employee to a stage, and move them between stages with a list on the row.

Opening an employee inside a pipeline shows their details, their notice dates, their tasks with a status (**Todo**, **In progress**, **Stuck** or **Completed**) and a notes panel. Tasks belong to a stage and are given to the employee with **Assign**.

Resignation Letters



A list of letters with filters for status (**Requested**, **Approved**, **Rejected**), planned leave date and **Group by** (Employee, Planned to leave date, Status, Department, Job Position, Reporting Manager). **+ Create Resignation Letter** opens a form with **Employee**, **Title**, **Description**, **Planned to leave on** and **Status** (**Requested**, **Approved**, **Rejected**). Someone without permission to view every letter sees only their own.

What moving someone to Archived does

This is a change to the employee's account, not a label. Moving an employee into a stage whose type is **Archived** sets the employee to inactive. Moving them out of an Archived stage to any other stage sets them active again. How each other screen treats an inactive employee was not checked.

Treat a stage of type **Archived** as the last step of an exit, taken only when the person has really left and final settlement is done.

Approve or reject a resignation letter

1. Open **Offboarding → Resignation Letters** and open the letter. The **Review** panel is on the right and appears only if you may decide letters.
2. To approve, choose the pipeline in **Add To Pipeline**, check **Notice Period Starts** (it is pre-filled with the planned leave date) and, if you know it, set **Notice Period Ends**. Select the approve button and confirm the prompt "Approve and add [name] to the selected pipeline?".
3. To reject, select **Reject Request** and confirm "Reject this resignation request?".

Approving needs a pipeline: without one the page says "Choose which pipeline to add the employee to." Approving marks the letter **Approved** and adds the employee to the first stage of that pipeline. Rejecting marks it **Rejected** and nothing else happens. Both need permission to change resignation letters.

What you should see

After each action the page returns to the list with a message: for example "Resignation request approved. [Name] added to [pipeline]." or "Stage changed to [stage]." Empty lists read "No offboarding pipelines yet" and "No resignation letters yet".

If it does not work

- **Resignation Letters says the feature is disabled.** The **Resignation Request** setting is off for the workspace.
- **You cannot see Create Pipeline or the stage controls.** You lack the permission and are not a manager of that pipeline.
- **Someone's status changed to inactive after an exit step.** They were moved to an **Archived** stage, which made them inactive. Move them back to another stage to reactivate them.

Not confirmed

- **A pipeline with people in it.** The workspace used for this page had no pipelines and no letters, so the pipeline page, the per-employee page, the stage and task forms and the approval form were not seen with data. The **Create Pipeline** and **Create Resignation Letter** forms were opened, not submitted.
- **Notifications.** Some in-app notifications sent by the older offboarding screens are not repeated by these screens. Which ones was not compared.
- **How an employee raises their own resignation letter** from an employee account was not checked.
- **Full and final settlement** is a stage type here; the settlement calculation itself is not covered on this page.
- **Approving or rejecting a letter, and moving someone between stages,** were not tried live.

Related

- How onboarding works
- The employee directory
- How assets work
- How payroll works