

# **`SOP B — Employee Off-boarding (15–30 minutes)**

## *ToroTek LLC — Standard Operating Procedure*

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Remove access fast, preserve evidence, and protect client data when someone leaves the firm—amicably or otherwise.

### **Before You Start**

- Effective off-boarding date/time and manager approval.
- Inventory of assigned devices, keys, access cards.
- List of systems: email, practice management, e-signature, cloud storage, phone/voicemail, SaaS apps.
- Password manager admin access for rotating shared credentials.
- Decide on email forwarding and auto-reply text.

### **Step-by-Step**

1. **Step 1.** Disable account sign-ins (email/SSO) at the scheduled time; keep mailbox/content for handoff.
2. **Step 2.** Reassign ownership of documents, calendars, and cases to the manager.
3. **Step 3.** Revoke tokens/API keys and sign-out sessions from all devices.
4. **Step 4.** Rotate all shared credentials the user had access to in the password manager; remove them from Shared Vaults.
5. **Step 5.** Collect devices; verify BitLocker is on; wipe and re-provision for next user.
6. **Step 6.** Update phone/voicemail; set up forwarding as approved.
7. **Step 7.** If litigation or retention applies, place relevant data on legal hold and document chain of custody.

### **Done-Right Checklist**

- All accounts disabled or converted per policy; forwarding/auto-replies set.
- Shared credentials rotated; vault memberships updated.
- All devices returned/wiped; inventory updated.
- Manager confirmed access to all reassigned files/cases.

### **When to Call ToroTek**

- Suspected data exfiltration or unusual downloads before departure.
- Missing device or unencrypted device involved.
- Users are subject to litigation hold or regulatory retention requirements.

### Pro Tips

- Schedule off-boarding for end-of-day to reduce disruption.
- Document every access change with timestamps.
- Rotate Wi-Fi password if you lack confidence in prior controls.

Need help? ToroTek is here.

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Updated: 2025-08-13