# Unified Checklist – Onboarding & Offboarding Workflow Readiness

## Stakeholder Role Clarity

* Are the initiators, approvers, and fulfillers clearly defined for both onboarding and offboarding?
* Is each group aware of their responsibilities and SLAs?

## Form Design & Conditional Logic

* Are separate request forms built for onboarding and offboarding?
* Is field logic tested for role-based visibility, dynamic values, and required fields?
* Do forms dynamically adjust based on inputs like department or job title?

## Task Library & Automation Mapping

* Are standard tasks created and grouped by department?
* Are tasks assigned using fulfillment groups with appropriate due date offsets?
* Do automations trigger approvals, notifications, and task distribution correctly?
* Is the parent ticket set to auto-close only after all child tasks are completed?

## SLA & Compliance Coverage

* Is provisioning set to occur at least 48 hours before start date?
* Are critical steps like account disablement and asset return tracked as separate tasks?
* Are SLA breaches escalated to the appropriate managers?
* Is offboarding tested for security, HR, and asset compliance touchpoints?

## Testing & Handoff Validation

* Have all forms been tested using impersonation for HR, IT, and hiring managers?
* Are handoff tasks (e.g., facilities collecting badges) fully documented with contacts and locations?
* Are email templates and alerts reviewed for tone and clarity?
* Is there a feedback mechanism for departments to improve workflows?