# Onboarding & Offboarding

## Feature

Making first days and farewells seamless, structured, and stress-free

Epic's **Onboarding & Offboarding** feature ensures that every new hire starts strong—and every departing team member exits with clarity and care. It replaces scattered checklists and forgotten tasks with a deadline-driven, mobile-enabled process that keeps managers, HR, and staff aligned from day one to day done.



Whether welcoming a new colleague or wrapping up a role, this feature turns transitions into well-managed milestones.

### Key Functions

- Customisable Checklists: Create onboarding and offboarding templates tailored to roles, departments, or sites. Each checklist includes descriptions, activity dates, responsibilities, and completion tracking.
- Deadline-Driven Task Management: Assign tasks to managers and staff with clear due dates. Email reminders prompt action, and clickable links allow items to be marked complete in real time.
- Progress Visibility: View live status reports for all onboarding/offboarding groups, plus detailed progress per individual—ideal for HR oversight and leadership reviews.
- Mobile App Enabled: Staff and managers can complete tasks, check progress, and receive reminders on the go—ensuring nothing gets missed, even off-site.
- Scheduled One-Off Emails: Trigger timely nudges for key tasks or milestones, helping teams stay proactive without manual follow-ups.
- Audit-Ready Records: Completed items are logged and visible for reference, creating a transparent trail for compliance, accountability, and continuous improvement.