Employee Offboarding Guide

The checklist provided below is designed to assist with the offboarding of a current employee. The employee's supervisor is responsible for reviewing the checklist to find the offboarding scenario that best represents the employee situation. Tailoring the checklist to the unique characteristics of the division/department, gathering forms and other paperwork as applicable, and advanced notification, in certain circumstances, may be required.

Supervisors are expected to promptly submit a Blue Team Form in every scenario. In some circumstances, a supervisor may request Human Resources hold the release of the form for a short period of time.

JDW 1//12/26

Department/Position Move

- Blue Team Form is required
- Is the employee Full Time/Part Time-One or Both
- Equipment/technology changes from former to future position
- Will the building keys, corrections access, or Fort Pass change from the former position to the future position change
- Do you need to notify any outside stakeholders of the change
- Former and future supervisors should review the employee's varied permissions
    - shared folders (G: drive, T: drive, etc.)
    - shared files (OneDrive, etc.)
    - active directories, email distribution lists or secondary calendars
    - Third Party Software (NISOD, Dropbox, Canvas, etc.)
    - Webpage/Web-editor access

Resignation/Retirement

- Blue Team Form is required
- Is the employee Full Time and/or Part Time
- The employee must submit a written letter to be shared with the supervisor, the President, Human Resources
- Supervisor should review the employee's varied permissions
    - shared folders (G: drive, T: drive, etc.)
    - shared files (OneDrive, etc.)
    - email distribution list memberships
    - active directories, email distribution lists or secondary calendars
    - Third Party Software (NISOD, Dropbox, Canvas, etc.)
    - Webpage/Web-editor access
- Account disabled

        - HR requests the account be disabled at time of exit interview
        - Supervisor will be notified of access timeframe
        - Who will monitor the employee's email
        - Where will phone calls be transferred to
    - Will final grades occur before or after resignation date
    - Timesheet/web leave must be completed before exit interview
    - Does employee have a nametag or business cards
    - All technology needs to be returned to Information Services
    - Building keys, corrections access or Fort Pass should be returned
    - Do you need to notify any outside stakeholders of the change
    - Information Services will notify the supervisor when to expect equipment (desktop, monitor, etc.) pickup.
    - If ample notice is given, the supervisor should start meeting with the employee and share information regarding current projects, daily tasks, and future concerns
    - Supervisors are given two weeks to review shared folders (G: drive, T: drive, etc.) and shared files (OneDrive, etc.). They must let IS know which items are to be moved to a new employee's account (if position is to be filled)

TERMINATION

If a supervisor finds themselves in the situation of needing to terminate an employee, there are additional "first steps" that may need to occur, prior to the Blue Team Form being submitted. Please reach out to your supervisor and to the Director of Human Resources prior to acting.

- Blue Team Form is required
- Is the employee Full Time/Part Time-One or Both
- Supervisor should review the employee's varied permissions
    - shared folders (G: drive, T: drive, etc.)
    - shared files (OneDrive, etc.)
    - active directories, email distribution lists or secondary calendars
    - Third Party Software (NISOD, Dropbox, Canvas, etc.)
    - Webpage/Web-editor access
- Account disabled
    - HR requests the account be disabled, at time of termination
    - Supervisor will be notified of access timeframe
    - Who will monitor the employee's email, is Out of Office necessary
    - Where will phone calls be transferred to
- All technology needs to be returned to Information Services
- Building keys, corrections access or Fort Pass should be returned
- Has the employee ordered/requested any materials from the print shop or any outside entities
- Do you need to notify any outside stakeholders of the change

- Information Services will notify the supervisor when to expect equipment (desktop, monitor, etc.) pickup.
- Supervisors are given two weeks to review shared folders (G: drive, T: drive, etc.) and shared files (OneDrive, etc.). They must let IS know which items are to be moved and/or deleted

UNEXPECTED DEATH

- Blue Team Form is required
- Supervisor should review the employee's varied permissions
    - shared folders (G: drive, T: drive, etc.)
    - shared files (OneDrive, etc.)
    - active directories, email distribution lists or secondary calendars
    - Third Party Software (NISOD, Dropbox, Canvas, etc.)
    - Webpage/Web-editor access
- Account disabled
    - HR requests the account be disabled,
    - Supervisor will be notified of access timeframe
    - Who will monitor the employee's email, is Out of Office necessary
    - Where will phone calls be transferred to
- All technology needs to be returned to Information Services
- Building keys, corrections access or Fort Pass should be returned
- Do you need to notify any outside stakeholders of the change
- Information Services will notify the supervisor when to expect equipment (desktop, monitor, etc.) pickup.
- Supervisors are given two weeks to review shared folders (G: drive, T: drive, etc.) and shared files (OneDrive, etc.). They must let IS know which items are to be moved to a new employee's account (if position is to be filled)