**Offboarding Checklist for Temporary Staff Positions**

The Offboarding checklist serves as a guide when staff are departing from the University (ending employment by resignation, separation, retirement, reaching appointment end date). The form may be enhanced related to the specific needs of each unit.

|  |  |
| --- | --- |
| Employee Name: |  |
| Employee Personnel Number: |  |
| Position Title: |  |
| Department: |  |
| Last Day of Employment: |  |
| New Phone Number: |  |
| New Email Address: |  |
| Forwarding Address: |  |
| Street Address |
|  |
| City, State, Zip Code |

**Part 1: Employee’s Responsibilities**

Upon Decision of **Departure**

* Resignation Letter. Submit resignation letter that states your last day of work to your chair/head.
* Pending Projects. Discuss status of pending projects and duties with supervisor/manager
* Email (Office 365). Email access ends immediately following your last day of employment, unless you have a subsequent active appointment (e.g. transfer to another UNL position). If you will not have a subsequent active appointment, it will be necessary to manage retrieval of personal information (including contacts and emails) prior to your last day of employment. You may also want to set an out of office reply or establish a rule to automatically forward messages, which will function for up to seven days after your last day of employment.
	+ Reminder for employees who are also UNL Students:

Employees who will continue as a UNL student should ensure their email address in MyRed has a personal email address: <https://myred.nebraska.edu>

* + Students can request a Huskers lifetime email account at <http://huskers.unl.edu>

There are resources available to help you retrieve information from your unl.edu email account. The email resources page on Information Technology Services’ website has more information <http://its.unl.edu/emailhome/resources>.

|  |  |  |
| --- | --- | --- |
| **Export Personal Emails and Contacts** | If you have another Microsoft Outlook account, the .pst format will allow an export of any content inside a folder. | How to export messages, calendar, tasks, contacts in .pst format:[Outlook 2013](http://office.microsoft.com/en-us/outlook-help/export-or-back-up-messages-calendar-tasks-and-contacts-HA102809683.aspx)[Outlook for Mac 2011](http://office.microsoft.com/en-us/mac-outlook-help/export-or-manually-archive-outlook-items-HA102928297.aspx?CTT=5&origin=HA104218074) |
| If you do not have another Microsoft Outlook account but you have Adobe Acrobat, export emails as PDF files. | To export as PDF, right click the folder in the navigation pane and select convert “folder name” to Adobe PDF. |
| You can also opt to forward individual emails to another account. |
| **Out of Office Automated Reply** | The Out of Office automated reply will function for seven days after your last day of employment. | How to enable out of office replies:[Outlook 2013](http://office.microsoft.com/en-us/outlook-help/video-set-up-automatic-replies-VA104154618.aspx?CTT=1)[Outlook for Mac 2011](http://office.microsoft.com/en-us/mac-outlook-help/turn-on-or-off-out-of-office-replies-HA102928407.aspx?CTT=1)[Outlook Web App](http://office.microsoft.com/en-us/office-online-help/automatic-replies-formerly-out-of-office-assistant-HA102844491.aspx) |
| **Forward Messages Automatically** | A rule to automatically forward messages received at your unl.edu email account will function for seven days after your last day of employment. | How to set a rule to forward messages:[Outlook 2013](http://office.microsoft.com/en-us/outlook-help/forward-messages-automatically-with-a-rule-HA103465692.aspx?CTT=1)[Outlook Web App](http://office.microsoft.com/en-us/support/use-rules-in-outlook-web-app-to-automatically-forward-messages-to-another-account-HA102919115.aspx) |

* Files. Review and purge files. Retrieve or delete personal and non-UNL work files, emails, and information from your work computer and UNL provided electronic equipment. If in a supervisory role, ensure that budgetary records, performance reviews (evaluations, correspondence, etc.), letters or emails containing resource commitments and unit strategic plans are labeled and organized in hard copy files for the supervisory successor.
* OneDrive/SharePoint. Review, purge and transfer files saved on OneDrive and SharePoint. Access to box.unl.edu ends immediately following your last day of employment, unless you have a subsequent active appointment (e.g. emeritus status, adjunct/affiliate). You may want to consider other cloud storage solutions with an account tied to your personal email address storage solutions (e.g. Dropbox).

* University Data. Migrate and delete all electronic files containing University data from personally owned computer, mobile devices, and cloud storage media (e.g. flash drives, etc.). Return all paper documents containing University data to department.
* Licensed Software. Remove or uninstall all University licensed software on personally owned computer and mobile devices.
* Travel Expenses. Submit any non-reimbursed travel expenses.
* Exit Interview. Request and schedule exit interview with supervisor/manager. Can also schedule exit interview with department chair or college dean if wish to do so.
* University Equipment. Return all UNL items and equipment to chair or head. Confirm status of equipment via **Objects on Loan** (found in Firefly on the Employee Self Service tab - firefly.nebraska.edu) and Key Management. Items that should be returned include:
	+ University purchasing card
	+ University photo ID card (NCard)
	+ University key card/access card
	+ All building, room, cabinet and file keys
	+ UNL cell phone, portable computer, iPad and/or tablet
* Forwarding Address. Update your forwarding address in Firefly Employee Self Service (ESS).
* Personal items. Remove all personal items from work location.

**Part 2: Employer’s Responsibilities**

* Ensure above items have all been accomplished and return this form to CEHS-HR with NCard, Pcard.
* Submit a ticket to ALTC (<http://cehshelp.unl.edu>) requesting the removal of the employee from Active Directory, the departmental OU, cancel NSave if necessary, and to remove manually assigned groups.
	+ **ALTC Help Desk Ticket #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee Name (printed) |  | Signature |  | Date |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Supervisor Name (printed) |  | Signature |  | Date |