**Offboarding Checklist for Staff**

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
* University Benefits. Contact University Benefits Office (472-2600) to discuss status and options available regarding health and life insurance benefits and retirement and reimbursement accounts. Retirement planning documents can be found online at <http://hr.unl.edu/benefits/retirement/>.
  + Continuation of health coverage under COBRA
  + Conversion or continuation of life insurance
  + Distribution of retirement contributions
  + Retirement accounts
* 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, insure 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.
* Box.unl.edu. Review, purge and transfer files saved on box.unl.edu. 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).

# Two weeks in advance of Departure Date:

* Subscriptions. Process change of address (mailing and electronic) for periodical and other subscriptions received at work location.
* Campus Services. Contact University offices as appropriate to discuss continued service options or notify providers of your last day of employment to end services.
  + University Athletics: 402.472.3111
  + University Parking: 402.472.1800
  + Campus Recreation: 402.472.3467
* 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, dean, chair or head, if applicable.

# Within Last Few Days of Departure Date:

* 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
  + 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.

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

**Part 2: Department Responsibilities**

* Obtain resignation letter from the employee that states employee’s last day of work Accept resignation letter through written communication.
* Send resignation letter to the CEHS Business Center right away so they can process the separation PAF or new appointment PAF (for emeriti and adjunct faculty).
* Pending Projects. Discuss status of pending projects and duties with employee.
* Provide employee with the Offboarding Checklist. Access to the systems listed below is terminated at the end of business on the last day of employment (appointment end date or separation date) unless the paperwork is submitted to initiate a subsequent active appointment (e.g. emeritus status, adjunct/affiliate) or to keep services active.

|  |  |
| --- | --- |
| SAP | Wireless Networks |
| Email (Office 365) | Educam |
| Blackboard | Sharepoint |
| NUgrant | Electronic Building/Door Entry Access |
| Blackboard Analytics | PeopleSoft/Talisma/NUView |
| Faculty Insight | MyNULOOK |
| File Sharing (Box.unl.edu) | UNL Foundation |
| Network Drives | NSave Desktop Service |

* Recommend that the employee meets with the University Benefits Office (472-2600) regarding Health, Life, TIAA-CREF, Fidelity and reimbursement accounts.
* Discuss notification and communication plan. Work with employee to create approach to transition internal/external communication.
* Telephone. Transition telephone contacts employee receives
* E-mail. Inform clients/customers employee will no longer be available at this e-mail address.
* Process any non-reimbursed travel expenses or other reimbursements.
* Confirm with employee that all University equipment assigned to employee has been returned. Update **Objects on Loan** (found in Firefly on the My Staff tab - firefly.nebraska.edu). Contact CEHS Business Center for assistance.
* University purchasing card. Notify CEHS Business Center to have the card canceled.
* University photo ID card
* University key card/access card
* Building, room, cabinet and file keys
* UNL Cell phone/portable computer/iPad/tablet
* Calling Cards – Cancel or Reassign by contacting the CEHS Business Center.
* Confirm with employee that all electronic files containing University data from personally owned computer, mobile devices, cloud storage media (e.g. flash drives, etc.) have been migrated and deleted.
* Confirm with employee that all paper documents containing University data have been returned to the department.
* Submit a ticket to ALTC (<http://cehs15.unl.edu/cehssupportdb/index.php>) requesting the removal of the employee from Active Directory, the departmental OU, cancel NSave if necessary, and to remove manually assigned groups.
* Retrieve search committee files, 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 if employee was in a supervisory role.
* Confirm with the employee that all University licensed software on personally owned computer and mobile devices has been uninstalled.
  + Those employees who installed Office products purchased through UNL on their home computers will have that license end at the time of the employment.
* Phone and Data Ports: Contact Centrex ([its-centrex@unl.edu](mailto:its-centrex@unl.edu) or 472-3434) to reset voicemail, change name on billing recording, remove phone service or place phone on a temporary disconnect, and to disconnect or reassign Data Ports.
* Contact department webmaster to ensure references to employee are removed from the web content.
* Obtain signed Offboarding Checklist from employee.
  + Note: signed forms need to be returned to the CEHS Business Center to be kept in the employee’s personnel file.

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