Offboarding Plan for Staff
Department Responsibilities

Use this plan as a guide when staff are departing from the University (ending employment by resignation, separation, retirement, reaching appointment end date). Please customize this plan related to the specific needs of your department/unit.

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| Employee Name: |  |
| Personnel Number: |  |
| Position Title: |  |
| Department: |  |
| Last Day of Employment: |  |

# Department Responsibilities

* Obtain resignation letter from the employee that states employee’s last day of work. Accept resignation letter through written communication.
* Pending Projects. Discuss status of pending projects and duties with employee.

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| Office 365 (including email) | SAP, PeopleSoft, Talisma, NUView | Network Drives |
| Building/Door Entry Access | Wireless Networks | LMS (Canvas) |
| Educam | Faculty Insight | NU Insight |
| MyNULOOK | NSave Desktop Service |  |
| NUgrant | UNL Foundation |  |

* 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. affiliate position or transfer to another UNL position).
* Recommend that the employee talks with the Benefits Office (472-2600) regarding Health, Life, TIAA, 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.
* Process separation PAF.
* Confirm with employee that ensure all university equipment assigned to them has been returned. Update Objects on Loan and Key Management.
	+ - PCard. Notify Procurement Card office to cancel the card
		- NCard. University photo ID card
		- Building, room, cabinet and file keys
		- UNL mobile devices (i.e. laptop computer/iPad/tablet)
* Confirm with employee that all electronic files containing university data have been migrated and deleted from personally owned computer, mobile devices, cloud storage (e.g. flash drives, etc.).
* Retrieve 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 employee that all paper documents containing university data have been returned to the department.
* Departments utilizing Active Directory should remove the employee from their departmental organizational unit (OU) and remove manually assigned groups.
* 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 on their home computers will have that license end at the time of the employment.
* Contact Telecom’s Centrex Services (telecomaccount2@unl.edu or 472-3434) to reset voicemail, change name on billing recording, remove phone service or place phone on a temporary disconnect.
* Data Ports. Contact Centrex Services (telecomaccount2@unl.edu or 472-3434)
	+ - To disconnect data port(s) associated with departing employee
		- To reassign data port(s) to incoming/replacement employee
* Contact department webmaster to ensure references to employee are removed from the web.
* Obtain completed and signed **Separation of Employment Checklist** from employee. This signed checklist needs to be kept by the department.