BALL STATE UNIVERSITY

Off-boarding Checklist

Supervisor Checklist upon Employee Separation/Retirement

Off-boarding Checklist (Completed by Supervisor):

The following checklist provides the steps a supervisor needs to complete in order for the employee to officially exit from the department. This checklist includes important People and Culture information and departmental logistics. Following the steps outlined in the checklist will facilitate the transition of the employee from active employment to their eventual departure date. Please note all items may not apply to all employees.

Retain both checklists with your department's employee records.

At First Notice of Departure:

- ☐ Obtain a resignation letter from the employee.
- ☐ Provide the employee a written acceptance of the resignation or notice that the request for Emeritus/Honoratus/retirement status is being forwarded.
- ☐ Give the employee the Off-boarding Checklist and Review it with them.
- ☐ Recommend that the employee meet with Payroll and Employee Benefits offices, if necessary.
- ☐ Enter an EPAF or submit an Employee End of Service Form (if the employee has not already done so) with the employee's termination date.
- ☐ Process any non-reimbursed travel expenses through the department prior to the employee's termination date.
- ☐ Confirm that the employee does not owe reimbursement of a signing bonus, promissory note for training expenses, or moving and relocation reimbursement.
- ☐ Confirm with the Payroll Office and the Employee Benefits Office (765-285-1834) that the employee has not used more University leave than has actually been accrued (pre-loaded for faculty/professionals/exempt staff), and inform the employee if any repayment is required.

On the last day:

- [ ] Obtain the Off-boarding Checklist from the employee (verify it is complete and signed by employee).

- [ ] Confirm with the employee that all University-owed equipment, including computers, has been returned to your department. Please review this Knowledge Base Article.

- [ ] Confirm with the employee that all electronic files containing University data from personally owned computers, mobile devices, cloud storage, and storage media (e.g. flash drives, etc.) have been migrated and deleted.

- [ ] Confirm with the employee that all University licensed software on personally owned computers and mobile devices has been uninstalled. This includes removing any BSU data from devices including synced email accounts, etc.

- [ ] Confirm with employee that all paper documents containing University data have been returned to the department.

- [ ] Confirm with employee that an out-of-office reply has been set for both voicemail and email.

- [ ] If applicable, contact the Helpdesk (765-285-1517) to request that the user's IT account or role be deactivated.

- [ ] Contact the department SiteCore user to ensure references to the employee are removed from all web content. If the employee was the designated SiteCore user, contact Marketing & Communications (765-285-1560) to make immediate updates here. Designate a new SiteCore user and request training here.

- [ ] Obtain the employee's keys and ID badge(s). Return University ID to the ID Card Office in BL001.

- [ ] Turn in the employee's University credit card to Purchasing, if applicable.

- [ ] Verify the return of departmental parking passes, if applicable.

- [ ] Verify return of tools, safety equipment, and uniforms.

- [ ] Verify return of any other University property (Please return handbooks to Employee Relations AD G002).

- [ ] Confirm the employee's departure with your department.

☐ Review Instructions for account creation and shelving posted on the IT Security Policies webpage with the employee: Employee General Information Systems Account Creation and Removal Timeline

☐ If the employee is a supervisor, notify the Employee Solution Center (765-285-1834) that the employee is leaving the university and the supervisor role needs updated. Banner will be updated with an interim or new supervisor to ensure employees and the new/interim supervisor have the right approvals and communication.

After employee's last day:

☐ Review the Processes and Procedures for Access to University Systems and Data for details about user permissions. Many of the critical permissions are automatically removed upon an employee job end date such as the systems listed in the Processes and Procedures for Access to University Systems and Data. If the employee had access to other systems, please enter a request at https://www.bsu.edu/helpdesk > Request Services > Security > and select the system the permission needs removed from.

- Please enter a request to remove the user from shared drives/calendars/resources by entering a request at https://www.bsu.edu/helpdesk > Request Services > Get Tech Help. Please be specific with the list of drives, calendars, and resources to remove the user from. Work with the Technology HelpDesk to verify that the computer drives have been cleared/archived and emails are retained as needed.

☐ Work with IT (765-285-1517) to clear/change all passwords for accounts including email, voicemail, and work station.

☐ Verify that a termination date has been entered in Banner which will end access to HR, Finance/Budget, Travel/Chrome River/Egencia, Workday, OneDrive Canvas, SciQuest, etc with University Human Resource Services (765-285-1834).

☐ Contact the HelpDesk (765-285-1517) to make sure that the employee's phone number has been deactivated and/or confirm that the phone has been forwarded.

☐ Remove the employee from recurring meetings in Outlook, and request the removal of the employee from any email distribution groups. Request removal here.

☐ Verify removal of any access to federal/state systems and update professional organization memberships.

☐ Request to reassign any direct reports to a new supervisor in the Banner and/or Workday system, if necessary, by contacting University Human Resource Services (765-285-1834).

☐ Verify building access and security cards have been deactivated with Work Control.

☐ Verify cancellation of signature authority over university accounts with the Controller's Office.

☐ Request to change authority in UKG for approving time cards (only applicable when a supervisor is leaving) with the Payroll Office (765-285-1834).

Signature:

Supervisor Name	Signature	Date

Employee Information:

Employee's Name (Last, First, Middle)	Employee BSU ID #
Position Title	Department

Employee's Last Day of Work

Additional Information for Supervisors:

1. **What do you do when you need to shut down employee access in a hurry?**
    a. Ensure permission for changes are approved through the Office of General Counsel OGC) and/or People and Culture (Formerly HR)
    b. For time sensitive issues, notify the Office of Information Security Services (OISS) by phone at 765-285-4390 during the day or Information Technology Operations 765-285-1549 during after-hours and instruct them to notify the Executive Director of OISS, Tobey Coffman by cell phone.
        i. Specify what access for the employee that needs removed such as
            1. Banner permissions
            2. Other specific system permissions
            3. Ball State email account
            4. If an out of office message needs to be set, provide the text
            5. Email proxy or forwarding
    c. If not time sensitive, notify OISS by email at OISS@bsu.edu
        i. Specify what access for the employee that needs removed such as
            1. Banner permissions
            2. Other specific system permissions
            3. Ball State email account
            4. If an out of office message needs to be set, provide the text
            5. Email proxy or forwarding

2. **How are employees notified about next steps if they are impacted through a layoff?**
Supervisors - You will receive a packet from People and Culture that includes the layoff handout and information about benefits.

3. **How can we transition any business emails to the next person in that role?**
Example: The person who enters the new role would need prior communication with employees, departments, etc.
    1) If the department just needs access to the former employee account, please create a request the Information Technology HelpDesk at https://www.bsu.edu/helpdesk > **Get Tech Help** and then request assistance from IT Security to get this set up.
    2) Employees who separate from the university while actively enrolled as students in Ball State University classes may request a new BSU email address through the Information Technology HelpDesk at https://www.bsu.edu/helpdesk > **Get Tech Help**
    3) Retirees keep access to basic services, but may request access to a new BSU email address through the Information Technology HelpDesk at https://www.bsu.edu/helpdesk > **Get Tech Help** if there is a need for any additional services and/or the retiree wants to direct business emails back to the department

    In these cases, all emails sent to the original address will return an "out of office" message that includes instructions for reaching the former employee at their new address and instructions for which office to contact regarding Ball State University business.

4. **How do departments search and find all OneDrive folders that an employee had access to upon employee separation?**
Someone from the department may enter a request through the Information Technology HelpDesk at https://www.bsu.edu/helpdesk> **Get Tech Help**. Please provide the department folder path.