

Proposed SharePoint Page for Employee Offboarding

The following is the first draft of the proposed SharePoint page.

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Involuntary/Immediate Separation

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In the event of an immediate employee separation contact HR to request an immediate termination of employee account access. View **Step 3** in the [Coordinate Separation Notices](#) checklist for a list of contacts.

Manager's Checklist

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Managers should use the following checklists to ensure that all necessary items are addressed before an employee's last day. Download the [Manager's Offboarding Checklist template](#) to edit and **save for your records**.

Coordinate Separation Notices

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Step	Description of Task	Date Completed	Notes/Link to File/Ticket#
1	Resignation letter/email received from employee		
2	Confirmation of resignation email sent to employee		
3	Provide resignation letter and separation date to HR Liaison and Budget office. Email/copy the letter to the following groups: <ul style="list-style-type: none">• Rich Schmaltz (schmaltz@ohio.edu)• Moriah Hudspeth (hudspeth@ohio.edu)• Taylor Reed (reedt3@ohio.edu)• uhr@ohio.edu• payroll@ohio.edu		

	<ul style="list-style-type: none"> • benefits@ohio.edu 		
4	Notify senior manager and ITLT		
5	Notify Legal Affairs of the separation if the person was being sponsored for their employment by Ohio University <ul style="list-style-type: none"> • Erin Patterson (patterson@ohio.edu) • legalaffairs@ohio.edu 		
6	Create a service ticket to deprovision system access		
7	Create a service ticket to deprovision hardware/equipment		
8	Create a service ticket to Remove Employee from Org Chart		
9	Coordinate with People, Functional and Product Teams to request employee be removed from reoccurring meetings in the calendar		--

Email Employee Final Tasks & Confirm Completion

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Note: Download the [Manager's Offboarding Checklist template](#) to edit and save for your records.

Step	Description of Task	Date Completed	Notes/Link to File/Ticket#
1	Email employee list of tasks to complete before separation. Use these template which includes: <ul style="list-style-type: none"> • Employee checklist • Knowledge and work transfer plan <ul style="list-style-type: none"> • Document current job duties • Business processes fulfilled by the job position • Departmental contacts required to perform your job duties • Service/technical Documentation • Systems, permissions, and service accounts and their associated passwords • Identify successor for all job duties and schedule knowledge transfer meetings 		
2	Receive completed employee checklist and Knowledge and work transfer plan.		
3	Schedule the Exit Interview. Review the Exit Interview Guidance before meeting.		
4	Assign a task to have the employee's name/information removed from web content or public materials on the day of separation.		
5	Assign a task to request the employee be removed from recurring meetings in the calendar on the day of separation.		
7	Confirm that employee has transferred ownership of documents or emails required by successor of the job position and inform team members of new work assignments.		

Resolve Outstanding HR Issues

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Note: Download the [Manager's Offboarding Checklist template](#) to edit and save for your records.

Step	Description of Task	Date Completed	Notes/Link to File/Ticket#
1	Process any non-reimbursed travel expenses through the department prior to termination date.		
2	Confirm that the employee does not owe reimbursement of a signing bonus or moving and relocation reimbursement.		
3	Confirm PTO requests and verify the employee has not used more PTO than has been accrued, and inform the employee if payment is required.		
4	Remove the employee from future scheduled On-Call rotations and contact list.		
5	If the employee has direct reports, make sure a new supervisor is assigned to the direct reports in My Personal Info .		

Day of Separation Checklist

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Note: Download the [Manager's Offboarding Checklist template](#) to edit and save for your records.

Step	Description of Task	Date Completed	Notes/Link to File/Ticket#
1	Conduct an Exit Interview for the employee and separation meeting with employee. Use the Exit Interview guidance .		
2	Confirm employee contact information is removed from any web content or public materials (such as the product or portfolio homepage, contact lists, etc.).		
3	Confirm computer equipment has been returned (local employees) or shipped (remote employees) to the IT Warehouse. If remote, a tracking number should be submitted to the manager by the departing employee.		
4	Confirm that all department-managed electronic access has been removed.		
5	Confirm that employee has been removed from recurring meetings in the calendar.		
6	Confirm that system access and hardware have been removed or returned (via deprovisioning tickets)		

Employee Checklist

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Note: Download the [Employee's Offboarding Checklist template](#) to edit and save for your records.

Managers are responsible for monitoring this checklist and ensuring completion.

Step	Description of Task	Date Completed	Initials	Notes/Link to File/Ticket#
1	Contact HR with questions about separation from university.			
2	Settle any debts or fines owed to the university (Parking tickets, library fines and books, etc.).			
3	Plan out and confirm all PTO requests in My Personal Info.			
	Complete the knowledge and work transfer plan. This includes: <ul style="list-style-type: none">• Employee checklist• Knowledge and work transfer plan• Document current job duties• Business processes fulfilled by the job position• Departmental contacts required to perform your job duties• Service/technical documentation• Systems, permissions, and service accounts and their associated passwords• Identify successor for all job duties and schedule knowledge transfer meetings			
4	Remove all personal items from the office.			
5	Review all sponsored guest accounts and determine if they need to be transferred to the successor of the job position or notify the guests that their access will be disabled after your separation.			
6	Provide UHR with a new mail address if moving.			
7	Remove email forwarding on the account and set up an out of office message on the email account and Voice mail with alternative contact information for job duties.			

How to Deprovision System Access

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To assist with submitting a ticket, [use this template](#) to plot out the employee's information.

1. Go to help.ohio.edu/TDNext.
2. Login with your OHIO ID if prompted.
3. Select the **Tickets** tab on the top navigation menu.
4. Select **+ Choose a Ticket Form** from the submenu.
5. Scroll to the top of the form.
6. Select the required **Form** field.
7. In the search box, begin typing **"Offboarding"**.
8. Select **(Provisioning) OIT Employee Onboarding/Offboarding** from the dropdown menu.
9. Select the **Template** field to reveal a dropdown menu.
10. Select **Add or Remove OIT Employee**.
11. In the required Requester/Contact field type **your OHIO ID** to reveal your name in the dropdown menu.
 - a. *Note: You can add a different requestor's name if you are entering the request on another person's behalf.*
12. **Acct/Dept** will autofill based on the information entered in step 11.
13. Add **Additional people to notify**. This should include the employee being offboarded and relevant supervisor(s).
 - a. *Note: You can search in the same manner as Step 11.*
14. Select the **Notify Contact(s)** checkbox.
15. Select **Internal** from the **Source** dropdown menu.
16. Status, Title, and Description should autofill based on the form selected in **Step 8**.
 - a. Visit Bobcat Insights to use the [Employee Lookup](#).
 - b. *Note: Further guidance can be found in the [Employee Lookup Dashboard Documentation](#) to find details about a given employee.*
17. Follow the instructions in the **Description** text box.
 - a. Complete the Employee Name, PID, OHIO ID, and start date.
 - b. Add or subtract relevant items from the template provided in the **Description** text box. You can also remove any unnecessary explanatory text from the form that is not required for processing. Here is a [deprovisioning description template](#).

How to Deprovision Hardware and Equipment

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To assist with submitting a ticket, [use this template](#) to plot out the employee's information.

1. Go to help.ohio.edu/TDNext.
2. Login with your OHIO ID if prompted.
3. Select the **Tickets** tab on the top navigation menu.
4. Select **+ Choose a Ticket Form** from the submenu.
5. Scroll to the top of the form.
6. Select the required **Form** field.

7. In the search box, begin typing **“Warehouse”**.
8. Select **Warehouse Operations/General Request** from the dropdown menu.
9. Select the **Template** field to reveal a dropdown menu.
10. Select **Add or Remove OIT Employee**.
11. In the required Requester/Contact field type **your OHIO ID** to reveal your name in the dropdown menu.
 - a. *Note: You can add a different requestor’s name if you are entering the request on another person’s behalf.*
12. **Acct/Dept** will autofill based on the information entered in step 11.
13. Add **Additional people to notify**. This should include the employee being offboarded and relevant supervisor(s).
 - a. *Note: You can search in the same manner as Step 11.*
14. Select the **Notify Contact(s)** checkbox.
15. Select **Internal** from the **Source** dropdown menu.
16. Status, Title, and Description should autofill based on the form selected in **Step 8**.
 - a. Visit Bobcat Insights to use the [Employee Lookup](#).
 - b. *Note: Further guidance can be found in the [Employee Lookup Dashboard Documentation](#) to find details about a given employee.*
17. Follow the instructions in the **Description** text box.
 - a. Complete the Employee Name, PID, OHIO ID, and start date.
 - b. Add or subtract relevant items from the template provided in the **Description** text box. You can also remove any unnecessary explanatory text from the form that is not required for processing. Here is a [deprovisioning description template](#).

Document Storage

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Student/PACE Employees

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Student worker/PACE employee offboarding should follow many of the checklist items already accounted for earlier in this document. The primary difference will be some items simply do not apply. Review the [Manager’s Checklist](#).

As manager, use your best judgement on which items apply. The student worker *will* need to be removed from the Workforce app.

Workforce Removal

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- To remove a student worker from Workforce refer to #29-Students, page 76 in the [Workforce Manager Time Sheet Approval Manual](#).

