

Offboarding Checklist for Faculty

The Offboarding checklist serves as a guide when faculty are departing from the University (ending employment by resignation, separation, retirement, reaching appointment end date) or when changing employment relationships (i.e. moving to an emeritus or adjunct appointment.) 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.
- Emeritus Status. Review eligibility for emeritus status (<http://svcaa.unl.edu/faculty/retirement-emeriti>) and submit request for emeritus status to your chair/head if eligible and desired.
- Grants Administration. Contact Sponsored Programs (472-3171) to discuss relinquishing or transferring an active grant to another PI or transferring the award to another institution. Transferring an award can take several months. Forms to initiate the process can be found online at <http://research.unl.edu/sponsoredprograms/forms-templates/>.
- 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. emeritus status,

adjunct/affiliate). 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 Outlook for Mac 2011
	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 Outlook for Mac 2011 Outlook Web App
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 Outlook Web App

- 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. Emeriti faculty have access to continued services. Learn more at <http://svcaa.unl.edu/faculty/retirement-emeriti>.
 - University Athletics Ticket Office: 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 dean, chair or head, if applicable.

Within Last Few Days of Departure Date:

- University Equipment. Return all UNL items and equipment to departmental chair or head. Confirm status of equipment via Objects on Loan 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.
- Discuss unit processes for requesting emeritus status. Schedule department vote if necessary.
- 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 relinquishing or transferring an active grant to another PI or transferring the award to another institution. Transferring an award can take several months. Work with Sponsored Programs (472-3171) to complete necessary paperwork.
- Discuss notification and communication plan for colleagues and students.
- Process any non-reimbursed travel expenses or other reimbursements.
- Process separation PAF or new appointment PAF (for emeriti and adjunct faculty).
- Confirm with employee that all University equipment assigned to employee has been returned. Update Objects on Loan and Key Management.
 - University purchasing card. Notify Procurement Card office to cancel the card.
 - University photo ID card
 - University key card/access card
 - Building, room, cabinet and file keys
 - UNL Cell phone/portable computer/iPad/tablet
- 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.
- Departments utilizing Active Directory should remove the employee from their departmental organization unit (OU) and remove manually assigned groups.
- 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 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 Centrex (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.
- Data Ports. Contact Centrex (its-centrex@unl.edu or 472-3434)
 - To disconnect data port(s) associated with departing employee
 - To reassign data port(s) to incoming/replacement employee
- Pager. Contact Centrex (its-centrex@unl.edu or 472-3434)
 - To disconnect pager associated with departing employee
 - To reassign pager to incoming/replacement employee
- Calling Card. Contact Centrex (its-centrex@unl.edu or 472-3434)
 - To cancel calling card associated with departing employee
 - To reassign calling card to incoming/replacement employee
- NSave Desktop backup service. Contact Centrex (its-centrex@unl.edu or 472-3434)
 - To cancel service and billing for departing employee
 - To reassign service to incoming/replacement employee
- Contact department webmaster to ensure references to employee are removed from the web content.
- Obtain signed Offboarding Checklist from employee.
 - Note: signed forms to be kept by the Department