OFFBOARDING – IT’S MORE THAN A SEPARATION CHECKLIST

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THE LONG ROAD TO OFF-BOARDING...
WHAT'S WRONG WITH THIS PICTURE?

- Yes, it's true.
- we provide door access to dead people
- we contact grieving widows and demand our laptop back
- Separated with cause?
  No problem. You get to keep your email acct. (so you can still represent yourself as an employee!)
- Hate the rules? Throw a tantrum.
STEPS ALONG THE WAY

- Identity & Access Management
- Employee Onboarding
- Employee Offboarding
- Audit Report
- Employee Offboarding (again)
IDENTITY & ACCESS TEAM

- Created IDM team
- Dug through processes and data; and learned to trust each other
- Once we understood each other, we were more willing to make changes
- Agreed on business rules and which data fields would drive provisioning
EMPLOYEE ONBOARDING

First effort at **changing the culture** at the departmental level

- Not just about Payroll anymore
- Updated practice to match capabilities
- Improved experience for all
Before IDM:
Many people had active records but no current appointment – meaning they had access to all UNL systems but had no current job

Appointment End Date:
• The key for ending services in a timely manner
• Implemented “Keep Services Active”
EMPLOYEE OFFBOARDING #1
-- A MUDDY EFFORT

- Inconsistent understanding and implementation of business rules for removing access

- Central IT organization had made decisions around email access to favor users, in absence of defined policy

- Effort could not get enough political support
  - Too much concern around faculty (current or former) losing access to email service
AUDIT REPORT

Internal Audit:
Reviewed an academic unit and found them to be out of compliance with **EXISTING POLICY** defined by NU Board of Regents (University System level) 20 years ago

The Audit:
- Highlighted risk posed by not consistently deprovisioning users
- Forced us to acknowledge our shared responsibility for mitigating risk
- Joint responsibility
NEW STRENGTHS

- Existing policy dusted off ➔ Consistent message
- Audit ➔ Focused Our Attention
- Political support (CFO, CIO, Provost) responded to mitigate risk
- IT, Academic Affairs, HR – ONE Team
MAKING IT REAL
DESIGNING A SUCCESSFUL OFFBOARDING INITIATIVE

- What are the business rules?
- Who are our audiences?
- How will we make it approachable and work smoothly?
- What's the timeline?
- What does success look like?
Lesson #1

Form a Working Team

Team make-up is important:
- Representatives from IT, HR, Academic Affairs
- Payroll staff are busy getting payroll out the door – find someone just outside the daily grind
- Find a few people who understand both languages: IT and business
- Learn what each other knows about systems, data storage, and business needs
Lesson #2
Governance Required

- Decision makers come together
- Understand the processes, systems, data, and the risk
- Empowered to make the changes that are needed (compliance) that everyone can live with
LESSONS #3 & #4

DUST OFF YOUR POLICIES AND FIND YOUR BACKBONE

- Leverage existing policies
- Have a common message
  Communicate to departments their responsibility for mitigating risk
Lesson #5

Use every available method to communicate

- Training materials
- Visual illustrations of process
- Emails

- Develop reporting that makes it easy for departments to check their own progress
Lesson #6

Be Prepared For Unhappy People

(and remember the bell curve)
NEXT STEPS

- Find your Campus Sponsors (Governance)
- Dust off Your Policies
- Develop a Team of Stakeholders
- Review and be willing to change processes
- Find the translators from IT to HR
- Communicate
- KEEP GOING
RESOURCES

• New Employee Onboarding steps guide
• Employee Provisioning timeline
• Faculty Offboarding Checklist

• UNL Website
  http://hr.unl.edu/offboard/

THANK YOU!