

Division of Student Life Off-Boarding Checklist

The purpose of this document is to provide specific division employee offboarding beyond the general HR employee exit checklist and UFIT information.

General Checklist

- Encourage your exiting employee to complete the HR Exit survey they will receive information on when they have formalized their departure.
- Conduct an exit interview with the employee prior to their departure. If they do not wish to conduct an interview with their direct supervisor, try to find someone else in the division they would feel comfortable talking with about their experience in the division.
- Work with the employee to create a succession plan for work responsibilities, whether the employee already has an individual taking over their position, or the position will be in an interim status.
- Discuss with the employee what would be appropriate for a farewell event, either within the department or division or with individuals.
- Reminder if your employee is requesting a leave cash-out that this is a once-in-a-lifetime request and may take several weeks to process. Should they return to a position at UF at some point, benefits may be different than what they currently have. Encourage the employee to discuss this directly with HR Benefits.

Technology

Leaving University – Normal Separation

Provisioning and Roles

- Department submits an “Exiting Employee IT Provisioning” help request at least 7 days prior to outgoing employees last day. [See <https://tss.it.ufl.edu/help-requests/>].
 - **Note:** This will result in a ticket being generated with Division of Student Life Tech Services.
 - For additional assistance, see MyIT Exiting Employee User Guide
- This process removes the outgoing employee’s access.

Email [Microsoft Office]

- **Note:** Outgoing employees leaving through a normal separation will have access to their mailbox for 30 days starting from their last official day. Access to my.ufl.edu to access forms and paystubs remains longer than 30 days.
- Obtain access to the outgoing employee’s email (PST File):
 - **Option 1**
 - On the employee’s last day with the department, have the outgoing employee create a PST file of their emails so that the Division has a record of all the emails they have sent and received.

- This process can take some time, so be sure that the outgoing employee starts this process at least a couple of hours before the end of their last day.
 - Have outgoing employee save the PST file on a shared file that has plenty of storage [best to provide them with the desired file location in advance].
 - Prior to creating the PST file, employee should be removing any personal, non-work-related emails they might have saved. **NOTE: these emails must be completely personal with NO work-related material within them. If there is any work-related information in an email, it must be included in the PST file.**
 - See last page of this document for creating a PST file.
 - **Option 2**
 - Alternatively, during an employee separation process, the department may request from UFIT an export of the contents of the employee's mailbox in a PST file which can be imported into either a service account or shared mailbox.
 - Additionally, the department may request that mail flow for the employee's mailbox be directed to the designated service account/shared mailbox to minimize the chance of important UF-business email being missed.
 - Other access, retention, and deletion needs can be discussed with the Microsoft Core team.
 - **NOTE: it is likely any such requests will be directed from UFIT to Division of Student Life Tech Services.**
- Remove outgoing employee from any email groups
 - If your department has any group email lists, remove the outgoing employee from those lists.
- Email Signature Departure Acknowledgement
 - *[Pre-departure]* Approximately two to four weeks prior to the outgoing employee's separation date, have employee add to their signature block a message explaining that they are leaving the University (with the effective date of their departure) and providing emailers with a list of appropriate divisional employee(s) to reach out to for different types of questions.
 - Outgoing employees can also include a personal email address in the message for people who are trying to reach them directly.
 - Example:
 - Hello. My last day with the University is [Date]. If you have any questions regarding [Certain type of issues] issues, please contact [Contact] at [Email]. If you have any questions regarding [Another type of issues], please contact [Contact] at [email]. For personal communications, you can contact me at [personal email].
- Email Out of Office Message
 - *[Post-departure]* On outgoing employee's departure date, have outgoing employee create an Out of Office message to reflect they are no longer employed with the University

- **[NOTE: It is okay to skip this step if the employee's emails are being redirected to another inbox that will be constantly monitored and immediately responded to.]**
- Out of Office message will mirror the Departure Acknowledgement in outgoing employee's signature line - that they no longer work with the University and providing them a list of appropriate divisional employee(s) to reach out to for different types of questions.
- Example:
 - Hello. I'm sorry I missed your email, but I no longer work for the University of Florida. If you have any questions regarding [Certain type of issues] issues, please contact [Contact] at [Email]. If you have any questions regarding [Another type of issues], please contact [Contact] at [email]. For personal communications, you can contact me at [personal email].
- For instructions on creating an out of office message in Microsoft Office, see [here](#).

Calendar [Microsoft Office] (including zoom meetings)

- For on-going meetings owned/scheduled by someone *other* than the outgoing employee:
 - Remove outgoing employee from the attendee list of any standing meetings to which they are currently invited
- For on-going meetings owned/scheduled by the outgoing employee:
 - If meetings will continue, have the outgoing employee identify who will take over primary responsibilities for that meeting and have that individual send out a new invitation to all the attendees who will continue attending the meeting
 - It does not appear that Microsoft Office does not allow one individual to transfer ownership of a meeting to another person.
 - Once the new invitation is sent, have the outgoing employee cancel their instance of the meeting.

Computer (physical equipment)

- Have outgoing employee return laptops or phones to the department's property/asset manager.
- Department's property/asset manager checks to make sure that the outgoing employee's desktop computer and monitors are left in the outgoing employee's office.

Computer Files

- Ensure that all the outgoing employees work-related computer files are saved to an easily accessible drive, preferably a shared drive that is accessible by the outgoing employee's supervisor.

Paid licenses [e.g., Salesforce, Adobe, Student Information Services].

- Determine what, if any, paid licenses outgoing employee has.
- Cancel those licenses on the effective date of outgoing employee's departure (if allowed) or, if the license is needed, transfer it to another employee within the department.

Qualtrics

- Best practice: as part of onboarding become a member of the Student Life Qualtrics group (requested through Assessment & Research) and Collaborate on any surveys with your unit's group (set up through Assessment & Research).
- Create a list of Qualtrics surveys you own, including their name and the anonymous hyperlink for their administration.
- Send this list to Assessment & Research requesting transfer of ownership to a specific existing colleague in the department, typically the direct supervisor.
- Update any email triggers to point to an existing appropriate staff person.

Microsoft TEAMS

- **Best practice: always have at least two owners for every Microsoft TEAM.**
- Prior to outgoing employee's departure date, have outgoing employee take the following steps:
 - For any TEAM that they were *co-owner* of:
 - Notify TEAM co-owner that outgoing employee will be removing themselves from the TEAM and that a replacement co-owner should be found.
 - Leave the TEAM, (if they are the sole owner of any *channel* within the TEAM, Microsoft will not allow them to leave the team until there is a co-owner for each channel)
 - For any TEAM that they were *sole owner* of [**again, not best practice**]:
 - Find two replacement co-owners of the TEAM, and
 - Leave the TEAM (make sure to find new owners for each *channel* within the TEAM as well).
- If, after the outgoing employee's departure, the department learns that outgoing employee had TEAMS folders that they had owned by themselves but had not yet relinquished, department can submit a ticket to UFIT to see if the problem can be escalated to Microsoft so a new owner can be added and the outgoing employee removed.

Terminated employee – Immediate Separation

- Office of Human Resources disables the person's Gatorlink account immediately, thus access to emails and other accounts ends as soon as the termination is made effective.
- While many of the processes above work for Immediate Separations, it is best to work with HR and Tech Services because of the nature of such cases.

Leaving the Division, but remaining with the University

Provisioning and Roles

- Department submits an Exiting Employee IT Provisioning help request at least 7 days prior to transferring employees last day. [See <https://tss.it.ufl.edu/help-requests/>].
 - **Note:** This will result in a ticket being generated with Division of Student Life Tech Services.
 - For additional assistance, see [MyIT Exiting Employee User Guide](#)

Email [Microsoft Office]

- Obtain a PST file of the transferring employee's email on the employee's last day with the Division so that the Division has a record of all the emails they have sent and received:
 - **Option 1**
 - This process can take some time, so be sure that the transferring employee starts this process at least a couple of hours before the end of their last day.
 - Have transferring employee save the PST file on a shared file that has plenty of storage [best to provide them with the desired file location in advance].
 - Prior to creating the PST file, transferring employee should remove any personal, non-work-related emails they might have saved. **NOTE: these emails must be completely personal with NO work-related material within them. If there is any work-related information in an email, it must be included in the PST file.**
 - See last page of this document for creating a PST file.
 - **Option 2**
 - Alternatively, during an employee transfer process, the department may request from UFIT an export of the contents of the transferring employee's mailbox in a PST file which can be imported into either a service account or shared mailbox.
 - **NOTE:** Mail flow *will not* be directed to another mailbox and departments *will not* be provided access to the employee's mailbox.
 - Transferring employee and supervisor should come to an agreement as to how divisional emails will be treated.
 - Example: Incoming divisional email will be transferred to former supervisor within 2 business days (unless marked urgent) and maintained by employee in a separate folder in Filed Emails specifically for Divisional Emails (There is no need to make specific subfolder by topic). Urgent emails will be forwarded as quickly as they are read.
 - **NOTE: it is likely any UFIT requests will be directed to Division of Student Life Tech Services.**
- Remove transferring employee from any email groups
 - If your department has any group email lists, remove the outgoing employee from those lists.
- Email Signature Departure Acknowledgement
 - *[Pre-departure]* Approximately two to four weeks prior to the transferring employee's transfer date, have transferring employee add to their signature block a message explaining that they are transferring to a new department within the University (with the effective date of their transfer) and providing emailers with a

list of appropriate divisional employee(s) to reach out to for different types of questions.

- Transferring employees can also include a personal email address in the message for people who are trying to reach them directly.
- Example:
 - Hello. My last day with the Division of Student Life is [Date]; after that date, I will be serving the University as [role] in [Department]. If you have any questions regarding [Certain type of issues] issues, please contact [Contact] at [Email]. If you have any questions regarding [Another type of issues], please contact [Contact] at [email]. For personal communications, you can contact me at [personal email]. You may also continue to email me for ongoing business correspondence at this email address.

Calendar [Microsoft Office] (including zoom meetings)

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- For on-going meetings owned/scheduled by the transferring employee:
 - If meetings will continue, have the transferring employee identify who will take over primary responsibilities for that meeting and have that individual send out a new invitation to all the attendees who will continue attending the meeting
 - It does not appear that Microsoft Office does not allow one individual to transfer ownership of a meeting to another person.
 - Once the new invitation is sent, have the transferring employee cancel their instance of the meeting.

Outlook Inboxes

- If you have access to specific Outlook Inboxes (e.g., Emergency Dean On Call) you need to ensure your access to that inbox is terminated. In some cases, a request can be made directly to the owner of that inbox. Alternatively, a DSL IT Ticket can be submitted to request removal. If you can recall / review how you were added to the inbox and if it was by a specific individual, reach out to that individual to request removal.

Computer (physical equipment)

- Have transferring employee return laptops or phones to the department's property/asset manager.
- Department's property/asset manager checks to make sure that the transferring employee's desktop computer and monitors are left in the transferring employee's office.

Computer Files

- Ensure that all the transferring employee's work-related computer files are saved to an easily accessible drive, preferably a shared drive that is accessible by the outgoing employee's supervisor.

Paid licenses [e.g., Salesforce, Adobe, Student Information Services].

- Determine what, if any, paid licenses transferring employee has.
- Cancel those licenses on the effective date of transferring employee's departure (if allowed) or, if the license is needed, transfer it to another employee within the department.

Qualtrics

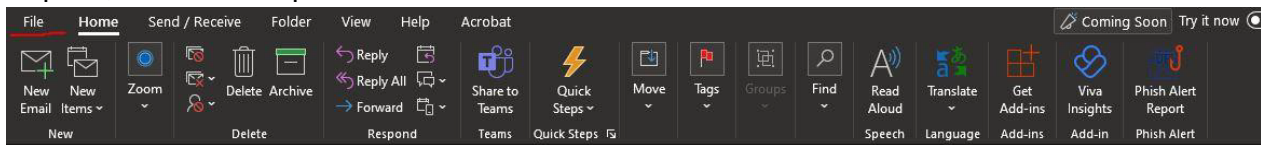
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Microsoft TEAMS

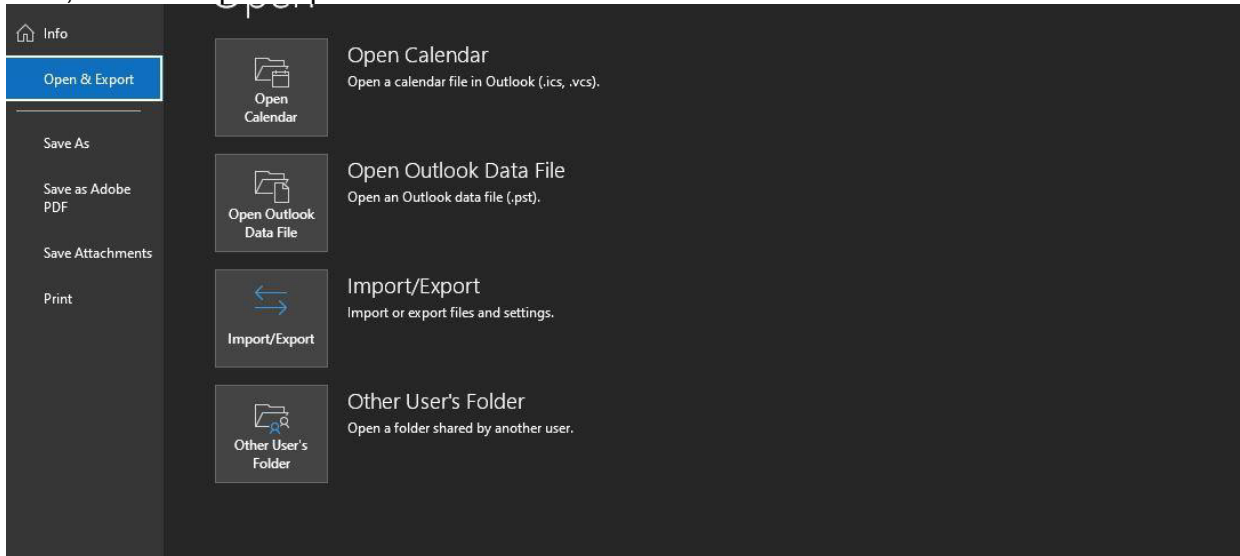
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- If, after the transferring employee's departure, the department learns that transferring employee had TEAMS folders that they had owned by themselves but had not yet relinquished, department can submit a ticket to UFIT to see if the problem can be escalated to Microsoft so a new owner can be added and the outgoing employee removed.

Creating PSTs

1. Open Outlook
2. In top left, click on the option for “File”



3. In the File Menu, click on the left hand side where it says “Open & Export”. From here, click on Import/Export.



4. In the window that pops up, do the following:
 - a. Export to File
 - b. Outlook Data File (.pst)
5. On the last screen, it will ask you what folders you would like to export. You can either select each folder as an individual PST (and need to repeat this process for each one), or you can click on the very top option that appears as your email address. This will create a PST for your entire profile.
 - a. I should mention, this is *NOT* recommended. Best practice is to create a new folder called “Export” in your Outlook and only move the emails that you will need.
6. It will then ask you where you would like to export the file. Select this like you would any other saved file.
 - a. For options here, leave it with “Replace Duplicates with items exported”.
7. Click finish. Please note that this can take a very long time and end up with a very large file depending on how many emails are being exported. Please be sure the place this is being saved has plenty of storage available.