

Streamlining Off-Boarding

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Agenda

ITS and HR have collaborated on off-boarding processes that will streamline the experience while providing important information to all parties involved – the employee, supervisor, Human Resources, and the ITS Help Desk.



Human Resources Off-Boarding Process



New Off-Boarding Checklist for Employees



Resources on the HR SharePoint site



Student Employment and ITS



ITS and HR collaboration process using TDX



New ITS Checklist for Supervisors

Human Resources Off-Boarding Process

01

Human Resources is notified of employee resignation.

02

Resignation documents are filed and entered in HRS.

03

Human Resources sends a notification to departments detailing the termination.

04

Human Resources emails the off-boarding checklist and exit-interview to the employee and supervisor.



New Off-Boarding Checklist

- [Off-Boarding Checklist 01.08.24.pdf](#)

EMPLOYEE RESPONSIBILITIES	
	1. Submitted resignation/retirement letter to Supervisor with a copy to Human Resources. Be sure to include your last day of employment in the notice. Sample Resignation or Retirement Letter
	2. Review information found on the Employee Benefits page regarding your eligibility to continue or convert your benefits. A continuation notice will be sent to you outlining this information. For additional questions, please reach out to UW-Shared Services by emailing benefits@uwss.wisconsin.edu or calling 888-298-0141.
	3. Entered final timesheet/all leave report(s) via MyUW Portal.
	4. Please complete the Exit Interview Survey prior to your last day. If you would like meet with Human Resources to discuss your completed survey, please send a request to humanresources@uwplatt.edu
	5. Reconciled any outstanding expense reimbursements (e.g. travel advance) with Business Services.
	6. Returned all property to the appropriate University units.
	7. Removed/copied all personal property (pictures, decorations, J Drive files, W-2 and earnings information from the portal, etc.) from work site and/or computer.
	8. Cancel University Parking. Contact police@uwplatt.edu or 608-342-1584
	9. Return all office and building keys to the Giese Facilities Management Building. <i>** Replacement of unreturned keys will result in charges to the respective key holder department, which may be passed on to the key holder. Failure to return certain key types may also result in legal action.</i>



New Off-Boarding Checklist

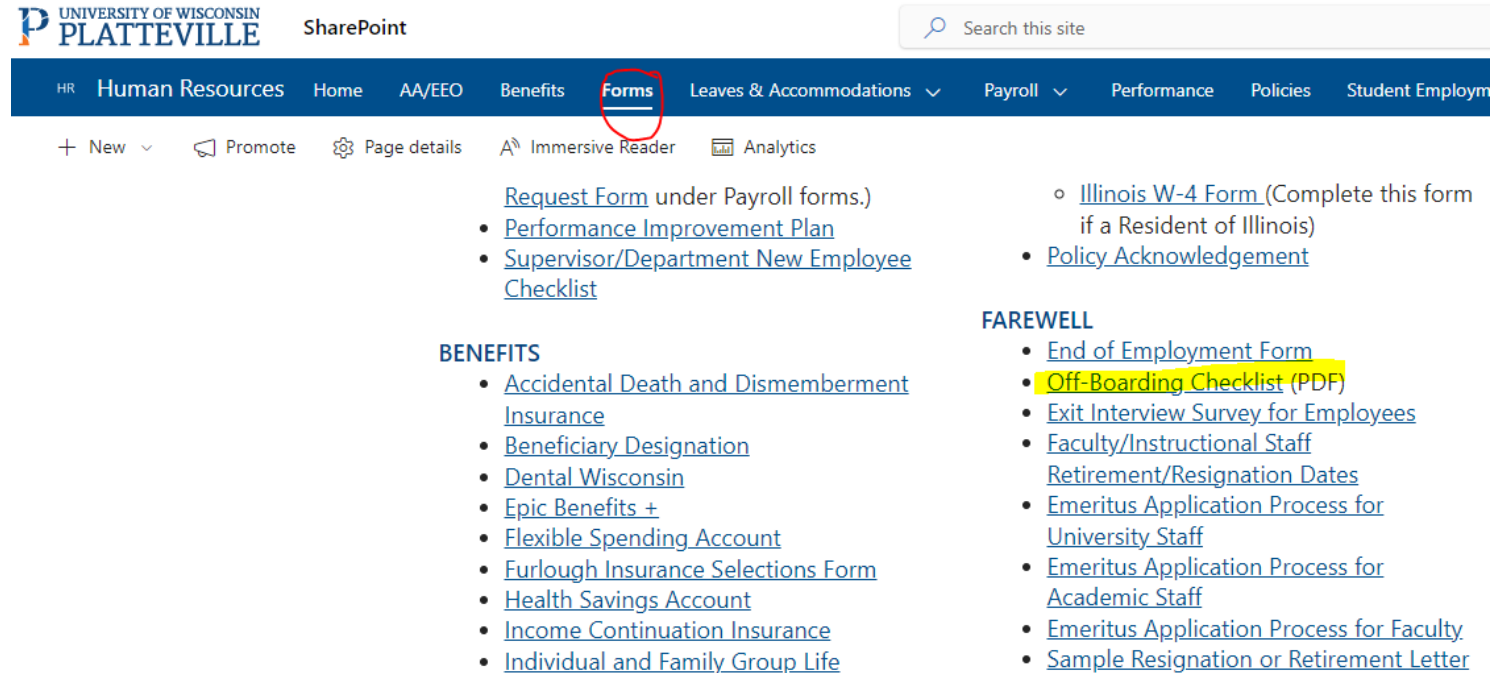
- [Off-Boarding Checklist 01.08.24.pdf](#)

SUPERVISOR RESPONSIBILITIES	
	1. Approve timesheet/all submitted leave reports. Notify Human Resources when this is completed.
	2. If this employee was a time and absence approver, please email payroll@uwplatt.edu with a list of employees and new approver(s).
	3. Collect university property such as: Pioneer Passport ID <u>and</u> desk keys, procurement, tax exempt cards, cell phone, laptop/iPad, flash drives/electronic devices issued by UW-Platteville.
	4. Obtain a list of all non-IT supported programs, websites, and software with which the employee has an account or for which the employee knows log-in information for a State, University or department account.
	5. Ensure that the employee has completed all required job responsibilities prior to departure or has arranged to have them completed on their behalf (including, but not limited to, submitting grades and completing an outside activities report).
	6. Consider recommending the exiting employee for Emeritus Status. Click for more information and application process: Emeritus Policy for University Staff , Emeritus Policy for Academic Staff , Emeritus Policy for Faculty



Resources on HR SharePoint

- The Off-Boarding Checklist will be sent directly to the individual employee and their supervisor.
 - If this email is misplaced, you can find it via our [Human Resources SharePoint Page](#) under the Forms section.
 - **Please note:** this checklist has items for the employee and supervisor to complete prior to employees last day on campus.



The screenshot displays the HR SharePoint site for the University of Wisconsin-Platteville. The top navigation bar includes 'HR Human Resources', 'Home', 'AA/EEO', 'Benefits', 'Forms' (highlighted with a red circle), 'Leaves & Accommodations', 'Payroll', 'Performance', 'Policies', and 'Student Employment'. Below the navigation bar, there are options for '+ New', 'Promote', 'Page details', 'Immersive Reader', and 'Analytics'. The main content area is divided into three columns. The left column lists 'Request Form' (under Payroll forms), 'Performance Improvement Plan', and 'Supervisor/Department New Employee Checklist'. The middle column is titled 'BENEFITS' and lists: 'Accidental Death and Dismemberment Insurance', 'Beneficiary Designation', 'Dental Wisconsin', 'Epic Benefits +', 'Flexible Spending Account', 'Furlough Insurance Selections Form', 'Health Savings Account', 'Income Continuation Insurance', and 'Individual and Family Group Life'. The right column is titled 'FAREWELL' and lists: 'End of Employment Form', 'Off-Boarding Checklist (PDF)', 'Exit Interview Survey for Employees', 'Faculty/Instructional Staff Retirement/Resignation Dates', 'Emeritus Application Process for University Staff', 'Emeritus Application Process for Academic Staff', 'Emeritus Application Process for Faculty', and 'Sample Resignation or Retirement Letter'.

What Happens if An Employee is Asked/Decides to Leave the Same Day of Giving Notice?

If an employee does not give a 2 weeks' notice or is discharged, supervisors should act quickly:

- Review the [Off-Boarding Checklist](#) on the HR SharePoint site to ensure all items are completed that are needed.
- Attempt to collect all University owned property. Contact HR for assistance if needed.
 - Campus ID, desk keys, office/building keys, procurement, tax exempt cards, cell phone, laptop/iPad, flash drives/electronic devices, etc. that were issued by UW-Platteville.
- Ensure all hours worked/absences are recorded. Contact HR for assistance with final timesheet entries if needed.
- Notify HR (if not already involved) of this occurrence including hours worked, last day, and employee's name.

Student Employment

When terminating a Student you will need to do the following for HR:

- Fill out the Termination Form that can be found out on the HR Sharepoint page under "Supervising Student Employees".
- Send the completed form through email to StudentEmployment@uwplatt.edu.



UW - Platteville Student Employment Termination

Submit **completed** form to studentemployment@uwplatt.edu

Last Name	First Name	EMPL ID	RCD #	Working Title	Last Day Worked	Reason
Pete	Pioneer	01234567	1	Mascot	1/17/24	Graduation

- There is also a Termination Checklist for students out on the SharePoint site that can help you to know the proper steps when terminating a student's employment.

[Terminating a Student Employee Checklist](#)

ITS and HR Collaboration

- Goal = smoothest transition possible for everyone
 - Guide supervisor with specific questions to ask departing employee
 - Help employee create to-do list
 - Assist supervisor when on-boarding a new employee



Employee Technology Self-Audit

Office 365: Check all components you have used.

Email/calendar (Outlook)

OneDrive

Teams

SharePoint/internal website

Other

Email: Your account will be active for 60 days after your last day.

- Set autoreply stating you are no longer with the university and who to contact for assistance
- Set up forward to different email
- Notify contacts of your new address

Calendar:

- Have you organized recurring meetings into the future? Find someone else to take over
- Change RSVP on future events

Office 365: Check all components you have used.

Email/calendar (Outlook)

OneDrive

Teams

SharePoint/internal website

Other

Teams: Inactive Teams will be deleted automatically after 365 days.

- Are you the organizer of any Teams site that will continue? Find a replacement and grant them Owner access
- Are there files that should be transferred somewhere else? Transfer them.
- Are there Teams sites that are no longer needed? Delete them.
- Are you a member of Teams sites organized by someone else? Leave the team.

Employee Technology Self-Audit

Network Storage: Check all volumes you have used.

USER1 (J drive)

SHARED 1 (S drive)

ACAD1

APP1

TECH1

others???

USER1 (J Drive)

- Remove/download personal files

Check all software applications you used as part of your job(s) at UW-Platteville.

Qualtrics

Perceptive Experience

Dashboard (MyURL....)

OBIEE

Others

Qualtrics

- Review your surveys. Which are still active or need to be retained for the future? Send a request to transfer ownership to the ITS Help Desk. Include the title of the survey and the name of the new owner.

Employee Technology Self-Audit

Equipment: This section addresses university devices issued or assigned to you.

Check all that apply

Desk phone

Cell phone

iPad/tablet

Laptop

Desktop computer

Other equipment

iPad/tablet

- Log out of your Apple account.
- Remove/download documents/photos

Employee Off-boarding Checklist [DRAFT]

DM

Deb Meyer <noreply@qemailserver.com>

To: Deb Meyer



Tue 1/16/2024 9:28 PM

Use this checklist as you prepare to transition out of your current job at UW-Platteville.

[Download as PDF](#)

URL to view Results

[\[Click Here\]](#)

Response Summary:

Employee Off-boarding: Technology Self-Audit

New ITS Checklist for Supervisors

- Now
 - Obtain a list of non-ITS support programs, websites, and software....
 - Have you collected... university-issued devices?
- New
 - What WGroups does the employee belong to?
 - What Teams sites does the employee manage?
 - Is the employee an approver of any workflow or forms?
 - Does the employee have open tickets with ITS?
 - Is the employee responsible for any email lists?
 - Does the employee manage any surveys, forms, short links for the dept?
 - Was the employee issued any iOS devices? Make sure they log out of their Apple account.



Questions?

Thank you!

