

Manager's Checklist for Employee Off-Boarding

- **Notification to other campus departments:**
 - [Complete a vacancy form](#) (*this form should be submitted as soon as you are aware of the employee's separation date*).
 - Collect keys and return to Bentley Police.
 - Shred the employee's ID card(s).
 - If employee has door codes that you would like changed, submit a work order to Facilities.
- **Recovery of Bentley assets:**
 - The employee's Bentley-issued computer(s) along with computer accessories (monitor(s), keyboard, mouse, docking station, power adapters, webcams) should be collected and placed in the employee's office location.
 - Unless incorporated in a formal faculty separation agreement, the employee will not be permitted to retain or purchase the computer they were issued.
 - Other Bentley purchased assets such as a department computer or iPad should be collected and returned at this time.
- **Employee's personal data:**
 - Personal data on Bentley-issued computer
 - Employee is responsible for removing any personal information on the computer and moving it to a personal location such as a flash drive.
 - Personal data in Bentley email:
 - The employee is responsible for removing any personal data and moving it to a personal location such as a flash drive. Employees are not permitted to take an entire copy of their email.
 - If an employee uses Bentley email to manage personal accounts – Banking, Netflix, Spotify, Cable TV, etc. – they should work with those companies and transition to a personal email account.
 - Personal data in OneDrive and Office 365:
 - The employee is responsible for removing any personal data and moving it to a personal location such as a flash drive.
 - Bentley Help Desk and other IT resources are not available to move, save or transfer personal data, but are available for consultation.
- **Business continuity and transition considerations (where applicable):**
 - Does the employee have department-specific data in their email or OneDrive account or on their computer hard drive?

- Have the employee copy this data to a Microsoft Teams site that can be accessed by the department later.
- Is the employee an owner or manager of a Microsoft Teams or Sharepoint site?
 - Have the employee add a new owner to the site.
- Does the employee receive email from other people who may not be aware they are leaving (colleagues on campus, vendors, employers, etc.)?
 - Have the departing employee create automatic out-of-office messages on their email and voicemail prior to departing, including information about who to contact in their absence. The employee's email and access to all Bentley systems will be disabled on the date of separation. Bentley IT can place a 30-day out-of-office message on an employee's disabled account if necessary.
- Does the employee manage or send email from group (GA) email accounts?
 - Submit a Help Desk ticket to add a new manager or sender.
- Does the employee manage other individual or departmental Outlook calendars?
 - Submit a Help Desk ticket to add a new person to manage the calendar(s).
- Does the employee login to other services or applications that do not use Bentley email credentials to access?
 - Identify the services and applications and request that the employee's account be removed or transferred to another employee if applicable.
- Is the employee responsible for renewing contracts, communicating with vendors, or processing purchase orders and invoices?
 - Work with Bentley Finance and Procurement to assign another employee to these responsibilities.
- If the employee has a purchasing and/or Travel card, contact Procurement to have the cards disabled. Cards should be shredded.
- If the employee manages your Bentley website, contact Digital Engagement to assign a new employee for training and access to make web edits.

Post-separation considerations and re-hire

Access to employee email or other data: After the employee's date of separation, access to the employee's email account or other data sources such as OneDrive will require a business justification and the approval of two Vice Presidents. After gaining approval, submit a Help Desk ticket for access to the specific emails or documents needed.

Re-hired employees: Per policy, 30 days after an employee's date of separation, email, OneDrive and other data residing under the employee's profile will be permanently deleted. If a separated employee is re-hired after 30 days of separation, email and other data cannot be restored.

Account extensions: As an exception, before the account expires a manager may request that a terminated employee's account be extended for documented business transition purposes. Access can be granted to the manager only and not to the terminated employee. Extensions must be approved by HR and have a pre-determined end date not to exceed 60 days from the date of separation. After gaining HR approval, submit a Help Desk ticket to request an extension.