

## Tech Training: Employee Off Boarding

When HR terminates an employee (by modifying their Banner record after the final paycheck has been issued), the AD network account is disabled except for Alumni, Retirees, and Loyal Servants (see below).

- Removal of *automatically assigned* Active Directory client roles (employee\_nonstudent, student\_recent, etc.) is handled via Banner-to-AD synchronization immediately upon modification of the employee Banner record.
- Removal of *manually assigned* Active Directory client roles (faculty\_manual, alumni\_u\_manual, etc.) and departmental fileshares / mailboxes must be handled by staff and requires the creation of the following 4040Connect tickets.

### Telephone

- Request Type = Telephone > Move/Add/Change
- Request to update the Display Name
  - If a replacement has NOT been hired, request a generic departmental name be temporarily assigned to the line.
  - If a replacement has been hired, request the new employee's name be assigned to the line (EmployeeOnboarding tutorial.)

### Mailbox

- HR uses a specific matrix to determine the status of a former employee. Former employees fall into one of three categories:
  - Retiree
    - Allowed to keep their Taylor username and myTAYLOR access
    - Allowed to keep their Taylor mailbox. Our job is to educate on pros and cons, but the retiree makes the final decision.
  - Alumni and Loyal Servant
    - Allowed to keep their Taylor username and myTAYLOR access
    - NOT allowed to keep their Taylor mailbox
  - None of the above
    - NOT allowed to keep their Taylor username or myTAYLOR access
    - NOT allowed to keep their Taylor mailbox
- Often, the department needs temporary access to the former employee's mailbox. Our job is to contact the department and determine whether or not the mailbox should be extended and temporary access granted.
  - Confirm who in the department needs temporary access
  - Determine an Expiration Date for the temporary access. 30 days is common.
- Submit Ticket
  - Request Type = Email > Server Side
  - Include the names of employees who need temporary access as well as the date access can be revoked
- Educate the former employee regarding the deletion of his/her mailbox and the need to forward important personal emails to a non-Taylor email account
- Educate the former employee regarding setting up an auto-reply informing others of his/her departure from Taylor

## *Computer*

Handling of a computer turned in by a former employee requires two tickets. Ticket #1 covers removal of documents and other personal information. Ticket #2 covers retirement or reissue of the device to another employee.

**NOTE: Computers dropped off at the TLC are handled by Client Services. Computers left in a client's office are handled by Technology Services. Enter a single ticket, and escalate to Tech Services. The steps below cover computers handled by CS.**

### ***Ticket #1:***

- Client = former employee
- Request Type = Computer > Windows (or MacOS) > Minor Config
- Personal files
  - Work with the employee to identify and move all important personal files to an external drive. The employee may also want to remove additional personal content from the computer if the computer is not scheduled to be reimaged. The easiest way to do this is to delete the entire user profile.
- Remove the employee as an Administrator on the computer
- Resolve the ticket

### ***Ticket #2:***

- Work with the department to identify their preference of how the device might be reused. IT may overrule, but it is our job to record the department's wishes.
- Client = departmental authority (usually the former employee's immediate supervisor)
- Request Type = Computer > Windows (or MacOS) > Minor Config
- Escalate to Technology Services (Level 2)
- Complete the Hardware Drop Off / Pickup process...

[http://4040.taylor.edu/Tutorials/TechTraining/tt\\_HardwareDropoffPickup.pdf](http://4040.taylor.edu/Tutorials/TechTraining/tt_HardwareDropoffPickup.pdf)

## *Client Permissions*

- Request Type = Domain Account (Active Directory) > Move/Add/Change
  - Remove access to shared resources
    - Departmental file shares
    - Departmental mailboxes
    - Supervisor's calendar
    - Supervisor's email account
  - Remove the employee's membership in shared security groups

## *Banner*

- Request Type = Banner > Server Side
- \*\*Confirm process with Scott

## *Card Access*

- Request Type = Card Access
- \*\*Confirm process with Meghan

### *Non-Technology*

- Former employees should turn all Taylor keys over to HR