

Manager's Digital Resources Checklist for Separating Employees

PURPOSE: To assist managers in identifying digital resources that require attention when an employee separates from their unit or the University, including leaves of absence.

INSTRUCTIONS: When you first learn that an employee will be transferred or terminated (for any reason, even joyful reasons), meet with your employee and go over the following items. *If you are concerned that an employee may be disgruntled and possibly delete email or system data (CMS, email, etc) or this is an emergency separation, please contact Human Resources for guidance.*

SEPARATING EMPLOYEE INFORMATION

Name:		
HSU User Name:	Extension:	Separation Date:

EMAIL

Agree to the manner in which the employee's HSU email account will be managed. Discuss the various functions the employee performs for which there may be emails that need to be transferred to the next person responsible for that function.

Please be aware that we are not able to restore emails once they have been deleted.

	Item	Response
<input type="checkbox"/>	Identify the person(s) who should receive the separating employee's existing email. Explore whether the separating employee has any Level 1 confidential data in their email, and make sure that confidential data is only given to another employee with responsibilities that are congruent with having confidential data.	Recipient's Name(s): Date:
<input type="checkbox"/>	Ask the separating employee to organize existing emails going to a single recipient into a single folder (the folder can have sub-folders if it makes better sense to not have all the emails in one lump). If the separating employee has emails that need to be distributed to multiple recipients, they should organize a different folder for each recipient.	Email Folder Name(s):
<input type="checkbox"/>	Send an email to help@humboldt.edu requesting that ITS move the folder(s) to the recipient(s), providing specifics regarding separating employee, email folder name(s) and recipient(s).	
<input type="checkbox"/>	Identify the person(s) who should receive future emails related to a specific function. Make sure your web site and other materials are changed to reflect the new contact information.	Recipient's Name(s):
<input type="checkbox"/>	Ask the employee to create an "automatic vacation response" for their HSU account which replies to <i>all</i> incoming email with a message like, "Mary Jones is no longer the Chair of the Department of Egyptology. If your email concerns matters related to the Department of Egyptology, please contact Ellen Harris at ellen.harris@humboldt.edu ." See: http://mail.google.com/support/bin/answer.py?hl=en&answer=25922	Message:
<input type="checkbox"/>	Agree to a date when the automatic vacation response should become active. Identify how long the response should stay in place (whatever makes sense for the normal business cycle of the function).	Time Period:
<input type="checkbox"/>	Have the employee edit their signature file so it no longer refers to positions or roles they no longer hold, nor creates a mis-impression about their status with the university	

<input type="checkbox"/>	If the separating employee has set up forwarding in their HSU Gmail account and they no longer wish to receive emails from HSU, have them un-do their forwarding setup. See http://www.humboldt.edu/its/node/752	
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Discuss the various functions the employee performs for which there may be electronic files that need to be transferred to the next person responsible for that function.

NETWORK FOLDERS

	Item	Response
<input type="checkbox"/>	Identify the person(s) who should receive files from the separating employee's network share. Explore whether the separating employee has any Level 1 confidential data in their network folder, and make sure that confidential data is only given to another employee with responsibilities that are congruent with having confidential data.	Recipient's name(s):
<input type="checkbox"/>	Ask the separating employee to organize all the files on their network share (U: drive) going to one recipient into a single folder (the folder can have sub-folders if it makes better sense to not have all the files in one lump). If the separating employee has files that need to be distributed to multiple recipients, they should organize a different folder for each recipient.	U Drive Folder Name (s):
<input type="checkbox"/>	Send an email to help@humboldt.edu requesting that ITS move the files from the separating employee's network share to the intended recipient(s), providing specifics regarding separating employee, folder name(s) and recipient(s). If the employee is leaving the university, also ask ITS to then close their network share.	Destination location(s): Date a network share should be closed:

PERSONAL COMPUTER

	Item	Response
<input type="checkbox"/>	Identify the person(s) who should receive files from the separating employee's local hard drive. Explore whether the separating employee has any Level 1 confidential data on their local hard drive, and make sure that confidential data is only given to another employee with responsibilities that are congruent with having confidential data.	Recipient's name(s):
<input type="checkbox"/>	Ask the separating employee to organize all the files on their local hard drive going to one recipient into a single folder (the folder can have sub-folders if it makes better sense to not have all the files in one lump). If the separating employee has files that need to be distributed to multiple recipients, they should organize a different folder for each recipient.	Local Drive Folder Name (s):
<input type="checkbox"/>	Ask your local IT desktop support staff to move the files from the local hard drive to the intended recipient.	Destination Folder Location and Name:
<input type="checkbox"/>	Ask your local IT desktop support staff to appropriately prepare the employee's computer for use by a different person. Details on appropriate methods can be found at http://humboldt.edu/its/security-securedestruction .	Date a computer should be cleaned:
<input type="checkbox"/>	Ask your local IT desktop support staff to remove the user from any locally maintained groups.	

Discuss the various functions the employee performs for which they have access to university information systems.

CMS ACCESS

	Item	Response
<input type="checkbox"/>	Submit an Access Request Form (https://humboldt.edu/forms/node/44) indicating that the employee's access to CMS should be terminated. Complete the following information and return to the ITS Project Office (Gist Hall 209, x5080): <ul style="list-style-type: none"> • User information section • Select 'Remove All Access' as the Request • Contact section (optional) • Approval section 	

WEBSITES and MAILING LISTS

	Item	Response
<input type="checkbox"/>	Contact your department's web page manager to request updates to the department website where the separating employee's name appears.	Department web page manager: Key information to update:
<input type="checkbox"/>	If the separating employee is a Department Web Site Owner, decide to whom the Ownership should be transferred. Have the separating employee request the transfer in Account Center. See https://www.humboldt.edu/its/node/749	Website(s): Transferred to:
<input type="checkbox"/>	If the separating employee is a Web Site Developer, have the Web Site Owner request that their Developer status be removed by emailing help@humboldt.edu	Web Site Owner:
<input type="checkbox"/>	If the separating employee maintains a personal web site that other people rely upon (e.g., research data, newsletters or professional association activities, decide to whom the web page should be transferred. Have the separating employee request the transfer in Account Center. See https://www.humboldt.edu/its/node/749	Website(s): Transferred to:
<input type="checkbox"/>	If the separating employee is a List Serv or Google Groups Owner, decide to whom the ownership should be transferred. Have the separating employee transfer ownership in Google Groups. See http://groups.google.com/support/bin/answer.py?hl=en&answer=46393	List Serv Name(s): Transferred to:
<input type="checkbox"/>	If the separating employee is a member of List Servs, ask them to unsubscribe in Google Groups. See http://groups.google.com/support/bin/answer.py?hl=en&answer=46608	

NOTES

Refer to Human Resources (<http://www.humboldt.edu/huhr> for additional Separating Employee information.