

Offboarding Checklist

These instructions are for end users and management.

For anyone leaving the COE, please follow the instructions below.

[For Departing Employees](#)

[For Managers & Admin Assistants](#)

[How Tech Handles the Backend Offboarding Process:](#)

For Departing Employees

- ❑ If *incoming emails* need to be forwarded to your manager, let us know and we will set that up on the back end.
- ❑ If needed, download **contacts** via CSV file format (creates a spreadsheet). For more information, please follow [this link!](#)
- ❑ Send us an **out of office reminder** message to explain departure date, forwarding contacts, and any other relevant details. If you need assistance with this, please include the request as part of the tech ticket. We will set this up for your account on the back end. Example:

Dear sender,

Thank you for your email. [first name, last name] is no longer with the Santa Cruz COE as of [date] and unfortunately can no longer answer your email. Please direct your inquiries to [first name, last name] at [email] or [phone]. He/she will be happy to assist you.

- ❑ If needed, transfer **Calendar** (*make sure to delete canceled events first*)
 - ❑ Download your Calendar (if you have personal info) with [this link!](#)
 - ❑ Share calendar events with and/or duplicate calendar if needed with [this link!](#)
- ❑ Submit a Tech Ticket to techsupport@santacruzcoe.org and include the following information:
 - ❑ Email subject line: **Name, Department, Phone Number, Offboarding**
 - ❑ In the body of your email, please include:
 - ❑ Name and department of offboarding employee
 - ❑ Employee's last day
 - ❑ If tech devices will be returned*
 - ❑ **Include the Asset Tag (the blue sticker with our name on it)** number of any devices you are returning
 - ❑ This is the metallic blue sticker that reads "Santa Cruz County Office of Education" and has a barcode and number. This sticker should be present on all computers.
 - ❑ Who you will be forwarding emails to (if applicable)
 - ❑ **NOTE:** Set to send to your manager or whoever takes over your duties, NOT to your personal email.
 - ❑ **NOTE:** See how to set up mail forwarding [here](#) (same link mentioned above).
 - ❑ who files should be transferred to (if applicable)

- ☐ Who will be taking over the position (if applicable)

All mobile tech equipment needs to be dropped off with Technology or a pick-up needs to be scheduled.

- ☐ Return badges and keys to M&O
- ☐ Remove information from website directory

For Managers & Admin Assistants

- ☐ Return all tech equipment (eg. laptop, tablet, monitors, port replicators (docks), mice, keyboards, etc.) to Tech Hut for reimaging and asset tracking.
- ☐ Remove offboarding staff from website directory
- ☐ If the departing employee did not do the above items, please do the following:
 - ☐ Submit a Tech Ticket to techsupport@santacruzcoe.org and include the following information:
 - ☐ Email subject line: **Name, Department, Phone Number, Offboarding**
 - ☐ In the body of your email, please include:
 - ☐ Name and department of offboarding employee
 - ☐ Employee's last day
 - ☐ If tech devices will be returned*
 - ☐ Who emails should be forwarded to (if applicable)
 - ☐ who files should be transferred to (if applicable)
 - ☐ Who will be taking over the position (if applicable)
 - ☐ Do calendar events need to be shared?

Please note: Google accounts will be suspended after 30 days.

****All mobile tech equipment needs to be dropped off with Technology or a pick-up needs to be scheduled.***

- ☐ Log in to the employee's Gmail. Ask Tech Support to reset the password for you that you can get in if they have not already done so. Following the instructions from the links above do the following:
 - ☐ Set up mail forwarding to the appropriate contact
 - ☐ If necessary, transfer their calendar. For the average employee most of the time this will not be needed, but use your discernment.
 - ☐ Set an out of office reminder to explain departure date, forwarding contacts, and any other relevant details. If you need assistance with this, please let us know via the tech ticket. Example of out of office reminder:

Dear sender,

Thank you for your email. [first name, last name] is no longer with the Santa Cruz COE as of [date] and unfortunately can no longer answer your email. Please direct your inquiries to [first name, last name] at [email] or [phone]. He/she will be happy to assist you.

How Tech Handles the Backend Offboarding Process:

- 1.) The tech ticket is received and recorded on the Offboarding tracking sheet.
- 2.) Remove staff from website directory on their last day (work with HR to get monthly reports of exiting employees and new hires as well)
- 3.) Contact info removed from phone list: (ask HR for updated list monthly)
- 4.) Suspend account as soon as employee leaves (when applicable)
 - a.) Remove from groups
 - b.) Confirm email is forwarded and drive is transferred
 - c.) Remove zoom license (if applicable)