DFW Offboarding

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Process Overview

- 1. Supervisors complete offboarding forms with HR
- IT Service Desk tickets are created to create tasks for all (most) of the offboarding tasks
- Supervisor is notified regarding offboarding employee's record management tasks
- 4. IGU performs second review before closing tickets
- 5. Automated process removes account from AD
- 6. Local and external drive backups transferred to Supervisor



Helpful information



Key data:

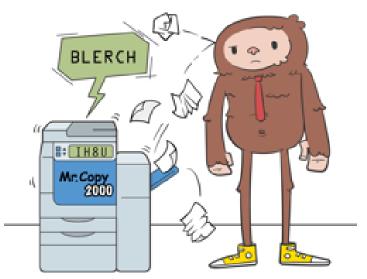
- Employee's position number
- Department and work unit information
- Supervisor's name
- Last day of employment
- Supervisor identifies next custodian
- Are there active legal or PRR holds?

Key takeaways ...

- Get connected with IT and HR!
- Supervisors have more responsibilities in O365: OCM Risk!
 - New requirement: Supervisors must take action on their employee's records in O365 in addition to physical and locally stored digital records.
- Keep an issues log of anything/everything that doesn't work as expected.
- Document process steps and average time to completion.
- MS 0365 has automation when an account is disabled.







IGU Work

- Provide guidance documentation on "how"
 - i. Label in OneDrive and Exchange Online
 - ii. Instructional emails linked to guidance docs by platform
 - iii. Answer Supervisor questions about retention
- QA/QC:
 - i. Did the employee or supervisor conduct labelling?
 - ii. If not, how will IGU label the records prior to releasing the O365 license? (RO's review and assessment)
 - iii. Any active legal or PRR holds?