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<b>Revised By:</b>	Joshua Graves	<b>Review Cycle/Date:</b>	Annual
<b>Reviewed By:</b>	Fonda Logston	<b>Reviewing Unit:</b>	Enterprise Programs
<b>Title:</b>	Offboarding SOP		
<b>Description:</b>	This document is the operating standard for offboarding.		

## Offboarding

### Standard Operating Procedure

1. General Statement of Purpose
  - 1.1. The purpose of this document is to standardize the process of offboarding.
2. Scope
  - 2.1. This document applies to the offboarding of all State of Oklahoma agencies.
3. Discipline
  - 3.1. Administrative Standards
4. Terms and Definitions
  - 4.1. Offboarding – The process surrounding the removal of access for an employee who has left the organization.
  - 4.2. Standard Separation – The termination of an employee who has given notice.
  - 4.3. Emergency Separation – The immediate termination of an employee.
5. Instructions
  - 5.1. OMES IS has two processes for offboarding, one for Standard Separations and one for Emergency Separations.
  - 5.2. Offboarding for Standard Separations
    - 5.2.1. When an employee gives notice of their resignation, their supervisor fills out the Offboarding form and emails the employee’s letter of resignation to their Human Capital Management (HCM) contact.
      - 5.2.1.1. The Offboarding form is located on the CRM Tool from the Customer Portal.
  - 5.3. Offboarding for Emergency Separations
    - 5.3.1. For emergency situations warranting immediate action, the employee’s supervisor must call their HCM contact.
      - 5.3.1.1. If the emergency is outside of regular business hours, the employee’s supervisor should call the OMES Service Desk.
    - 5.3.2. HCM must then call the Service Desk Manager or leads.
      - 5.3.2.1. The Service Desk Manager can be reached by calling the OMES Service Desk at **405-521-HELP (4357)** or **866-521-2444**, letting them know you have a priority HR case and that you need to speak to the Service Desk Manager.
    - 5.3.3. The Service Desk Manager then fills out the Offboarding form, but waits to submit it until HCM gives them the confirmation.

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#### 5.4. Offboarding Tasks

As a result of submitting the Offboarding Form, the CRM Tool will automatically create the following tasks, with the noted exceptions. These Offboarding Tasks are divided into three classifications based on when they must be performed.

5.4.1. **Priority 1** – These tasks must be performed immediately upon the effective date and time.

<b>PRIORITY 1 TASKS</b>	
<b>TASK</b>	<b>PERFORMER/TEAM</b>
Fill out Employee Clearance Form	Supervisor & Employer
Turn in badge, agency equipment, keys, gas card, purchase card and any state-issued mobile devices	Supervisor
Remove Building Access	IS-Project Management Office
Disable Active Directory and Email Groups	IS-Security Provisioning
Disable VPN Account	IS-Security Provisioning
Deactivate Cell Phone Account	IS-Voice
Set Out-of-Office for Email	IS-Security Provisioning
Disable PeopleSoft Account	IS-Security Provisioning
Terminate Wiki Access	IS-Service Desk
Terminate Imaging Access	IS-Content Management
Email Oklahoma Interactive ( <a href="mailto:helpdesk2@egov.com">helpdesk2@egov.com</a> ) to terminate access	IS-Service Desk
Deactivate User Access to Voice tools	IS-Voice
Deactivate User Access to Network tools	IS-Data Communications
*Terminate Agency Internal and External Application Access	Agency Applications Team

5.4.2. **Priority 2** – These tasks must be performed within 24 hours of the effective date and time.

<b>PRIORITY 2 TASKS</b>	
<b>TASK</b>	<b>PERFORMER/TEAM</b>
Deactivate Cherwell Access	IS-Security Provisioning
Deactivate PPM Tool Access	IS-Service Desk
Terminate Communication Applications Access	OMES-Communication Department
Remove Security Access to QRadar, CyberWarn, etc.	IS-OMES Security
Setup Temporary Access to Email/Computer Files	IS-Security Provisioning

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5.4.3. **Priority 3** – These tasks must be performed within 5 business days of the effective date and time.

<b>PRIORITY 3 TASKS</b>	
<b>TASK</b>	<b>PERFORMER/TEAM</b>
Remove Desk Phone	IS-Voice
Delete Voicemail Box	IS-Voice
PC Decommissioning	IS-PC Support
Update Floor Plan (OMES Data Center only)	IS-Executive Support
Terminate MobileIron Account	IS-Security Provisioning
Terminate SEAT Account	IS-Service Desk
Reclaim Licenses for Installed Software	IS-PC Support
Update Emergency Evacuation Plan	IS-Project Management Office
<i>**Vacate in Benefits Administration System (BAS)</i>	<i>Human Capital Management</i>
<i>**Send Exit Survey</i>	<i>Human Capital Management</i>
<i>**Terminate in PeopleSoft</i>	<i>Human Capital Management</i>
<i>**Vacate in the PPM Tool</i>	<i>Human Capital Management</i>

\* The Service Desk creates these tasks and assigns them to the appropriate application teams.

\*\* These tasks are not automatically generated in the CRM Tool. Instead, they are completed when HCM receives the resignation letter.

## 6. References

6.1. **Employee Clearance Form** - <https://www.ok.gov/OSF/documents/ClearanceForm.pdf>