

Offboarding Checklist

Name: <input style="width: 90%;" type="text"/>	CWID: <input style="width: 90%;" type="text"/>
Department: <input style="width: 90%;" type="text"/>	Division: <input style="width: 90%;" type="text"/>
Date Notified: <input style="width: 90%;" type="text"/>	Last Working Day: <input style="width: 90%;" type="text"/>
Reason: <input type="checkbox"/> Voluntary <input type="checkbox"/> Involuntary	

Instructions:

Complete the relevant tasks below based on the person type(s) associated with the individual. Not all tasks will apply to all individuals, but this document serves as a guideline for offboarding all types of individuals effectively and efficiently. The phased timing of the tasks are to be used as a guide when an individual is terminating voluntarily with advanced notice. In the event of an unscheduled or immediate termination, the *red* tasks should be completed first, as this will ensure system access is removed first. *This form should remain on file with the department to document actions taken at off-boarding.*

		Person Type				Activity/Task for Supervisor/Department Administrator to Perform	Additional Guidance
		Academic	Non-Academic	Students	Affiliate (incl. Vendor/Contractor/Temp)		
Upon Notification of Termination	✓	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtain resignation letter and keep on record	If employee does not submit resignation letter, contact your HR Business Partner for guidance.
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Complete NYPH Credentialing Office Termination form	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Complete WCM Recommendation for Termination of Appointment form	Available online at http://weill.cornell.edu/ofa/forms.html
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Complete E&M Notification Form (schedule badge deactivation)	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Notify ITS Support and appropriate offices of CWID termination	Open ITS Support ticket; notify HR, Office of Faculty Affairs, Education Administration, etc.
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Create/reconcile inventory of assigned devices	Obtain ITS tag numbers for desktops, laptops, smartphones, tablets, etc.
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Coordinate disposal or disconnection of ITS equipment	Complete ITS Asset Disposal Form (https://its.weill.cornell.edu/how-to/forms) or contact EHS for bulk disposal
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Coordinate repurposing of ITS equipment	Submit ticket to ITS Support to request wiping or re-imaging
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtain upcoming patient visit schedules and prepare for transition	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submit request for custodial access to user's files, voicemail, email, etc.	Submit request to MARIA tool (https://iam.weill.cornell.edu/maria/dashboard)
Prior to Termination		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submit request to discontinue 9 account	Submit request via WBG (Access Request Forms - NY Departmental Access Request Form)
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submit request to cancel procurement card	Submit request via WBG (P-Card Allocation Data Change)
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submit request to cancel one card/commercial card	Submit request via WBG (P-Card Allocation Data Change)
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Notify Housing of employment end date	Submit notice via https://housing.weill.cornell.edu
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Discontinue patient appointments/sessions	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtain provider's patient list for notification	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Create departure letter for patients	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Request updates to WCM websites	Email request to pops@med.cornell.edu
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Survey office for any additional devices, equipment, furniture	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arrange removal of all personal belongings (provide boxes if needed)	
At Time of Termination or Immediately Thereafter		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arrange for cleaning, shampooing and painting as needed	Submit maintenance request to Engineering and Maintenance
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Arrange for door/directory signage to be changed	Submit maintenance request to Engineering and Maintenance
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submit request to ITS to discontinue access to WCM systems, file shares, etc.	Indicate NYP system access, if known, in request to ITS
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtain building ID badge	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtain keys for office, file cabinets, etc.	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Collect lab coats	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Collect scrubs	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submit request to disconnect private phone line, fax, pager, etc.	Submit request to NYP Telecom (http://webapps.nyp.org/tsr/)
After Termination		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Submit request to update or disconnect answering service	Submit request to NYP Telecom (http://webapps.nyp.org/tsr/) or outside service provider, if applicable
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtain and return unused prescription pads	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Discontinue provider's scheduling templates	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recycle unused business cards	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recycle individual's personalized letterhead	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update department's contact sheet	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update physician referral service	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update lab forms	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Notify key departments of individual's termination	Consider notifying POBO, Research, Compliance, etc.	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ensure all pending patient notes have been signed		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ensure all patient charts are closed		
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Coordinate collection, removal, or repurposing of ITS equipment with ITS		

Completed By: **Date Finalized:**