



SOP for Employee Separation
Revision 1

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SOP for Employee Separation
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Revision	Date	Responsible Person	Description of Change

Recertified:

Initials				
Date	xx/xx/2011	xx/xx/2012	xx/xx/2013	xx/xx/2014



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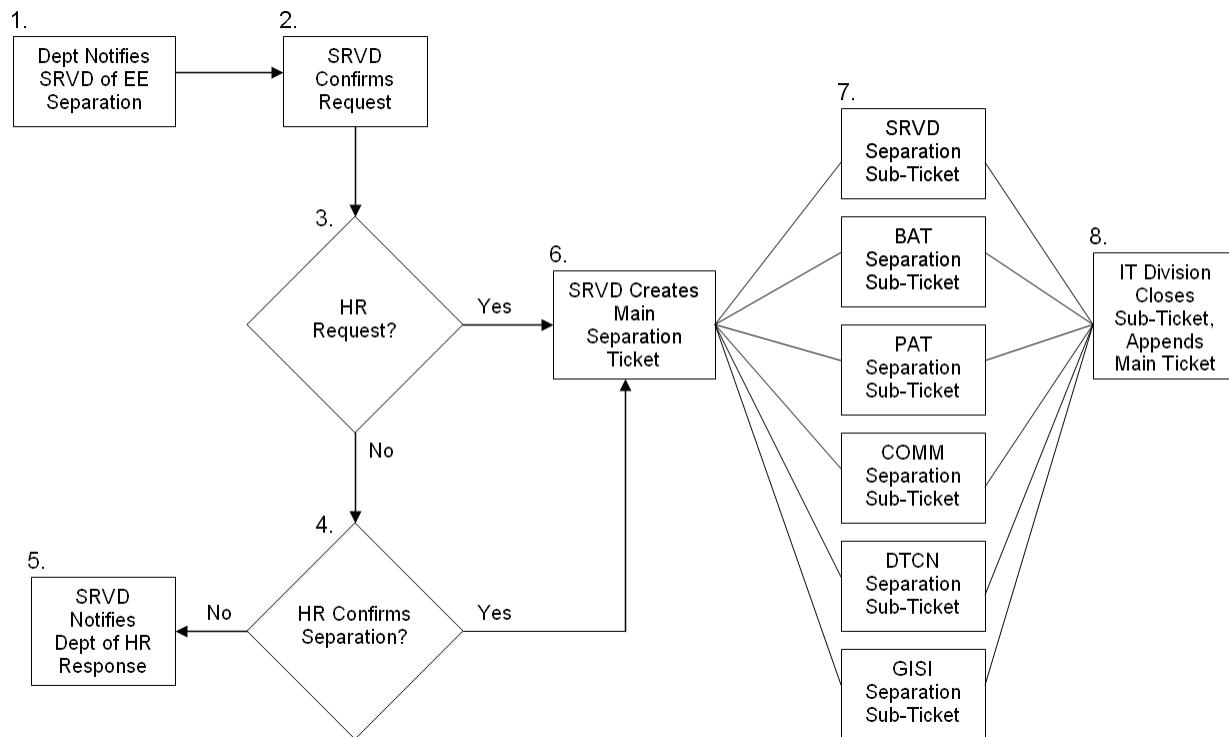
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Purpose and Scope:

The purpose of this SOP is to standardize a procedure in which Information Technology (IT) processes separations for City of Roseville (City) employees. IT will use this standard operating procedure (SOP) whenever a City employee separates employment from the city. The intended audience of this document is IT staff.

Summary of Procedure:

The desired end result of this SOP is a workflow that facilitates IT's administration of City employee separations.



Each numbered step in the workflow diagram above corresponds to a numbered step in the Procedure section.

Definitions:

BAT – Business Application Team	HR – Human Resources
COMM – Communications Team	PAT – Planning and Administration Team
DTCN – Data Center Team	SOP – Standard Operating Procedure
GISI – GIS and Internet Team	SRVD – Service Desk Team

Procedure:

1. A city department sends a request to the SRVD that an employee is separating employment from the City.
2. SRVD needs to confirm the request with HR before taking any action.
3. If the request comes from HR, the SRVD can proceed to Step 6.
4. If the request from any other City department, the SRVD must confirm the separation request with HR.
5. If HR cannot confirm the separation request, the SRVD notifies the department originating the separation request that HR cannot confirm their request.
6. If HR confirms the separation request or the request is from HR, the SRVD will create a main ticket with a Quick Pick called 'Employee Separation'. The Quick Pick will send emails to the IT Divisions, notifying them to create sub-tickets for this employee separation. See Appendix A for what information this main ticket should contain.
 - a. The SRVD will assign the appropriate priority to the ticket based on the Change Date. Immediate terminations must have a critical priority.
 - b. The SRVD will populate the Target Date and Required By Date fields.
7. A representative from each IT division will create a sub-ticket after receiving the main 'Employee Separation' Quick Pick notification. The manager of each IT division will assign a primary and secondary representative from their division to manage separation requests. The primary representative is responsible for ensuring the separation requests are completed. In the absence of the primary, the secondary representative will assume the separation responsibilities of the primary. Each manager will communicate these initial designations and subsequent changes to SRVD so that division can follow up if necessary.
 - a. When creating the sub-ticket, the IT division representative will select a Quick Pick called 'Employee Separation (xyz)' where 'xyz' stands for the IT division abbreviation. Each IT division's Quick Pick will include a separation checklist specific to each IT division in the Full Description field.
 - i. Employee Separation (SRVD) – See Appendix B for what information this sub-ticket should contain.
 - ii. Employee Separation (BAT) – See Appendix C for what information this sub-ticket should contain.
 - iii. Employee Separation (PAT) – See Appendix D for what information this sub-ticket should contain.
 - iv. Employee Separation (COMM) – See Appendix E for what information this sub-ticket should contain.
 - v. Employee Separation (DCTN) – See Appendix F for what information this sub-ticket should contain.
 - vi. Employee Separation (GISI) – See Appendix G for what information this sub-ticket should contain.
 - b. The IT division representative will assign the same priority as the main ticket.



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- c. The IT division representative will populate the Target Date and Required By Date fields with the same data as the main ticket.
- d. The IT division representative will add a note to the main ticket with their sub-ticket number.
- 8. The IT division representative will append a brief completion message to their note on the main ticket when their sub-ticket is closed.

Records Management:

After completing the SOP, a series of tickets are the output.

Reference:

None.



Appendix A (Main Separation Ticket):

The Quick Pick “Employee Separation” should populate with a checklist similar to the one below. Populate each checklist item on the ticket.

1. First Name:
2. Last Name:
3. Change Date:
4. Department:
5. Location:
6. Employee Number:
7. Telephone Extension:
8. Status: Separation
9. Supervisor/Manager:
10. HR Confirmation:
11. Notes:



Appendix B (SRVD Separation Ticket Checklist):

The Quick Pick “Employee Separation (SRVD)” should populate with a checklist similar to the one below. Record the main separation ticket number before saving the sub-ticket.

Main separation ticket:

1. Disable Active Directory login(s).
2. Change password on shared network login.
3. Disable Citrix account(s).
4. Coordinate with separating employee’s manager to save local PC data
5. Reclaim desktop PC.
6. Redirect email per separating employee’s manager instructions.
7. Coordinate with separating employee’s manager to save email data.
8. Remove separating employee’s email address from distribution lists.
9. Coordinate with separating employee’s manager to save local laptop data.
10. Reclaim laptop.
11. Disable multi-function printer account.
12. Update Microsoft Office license inventory.
13. Update OS license inventory.
14. Update other software license inventory.
15. Lock network data temporarily.
16. Coordinate with separating employee’s manager to save/transfer network data.
17. Reclaim personal digital assistant (PDA).
18. Coordinate with separating employee’s manager to save local PDA data.
19. Reclaim other hardware as necessary
20. Notes:



Appendix C (BAT Separation Ticket Checklist):

The Quick Pick “Employee Separation (BAT)” should populate with a checklist similar to the one below. Record the main separation ticket number before saving the sub-ticket.

Main separation ticket:

1. Disable Banner Login
2. Disable Class Login
3. Disable IFAS Login
4. Disable Hansen Login
5. Disable Permits Plus Login
6. Disable Sire Login

Appendix D (PAT Separation Ticket Checklist):

The Quick Pick “Employee Separation (PAT)” should populate with a checklist similar to the one below. Record the main separation ticket number before saving the sub-ticket.

Main separation ticket:

1. Reclaim IT Physical Keys
2. Schedule IT Exit Interview

Appendix E (COMM Separation Ticket Checklist):

The Quick Pick “Employee Separation (COMM)” should populate with a checklist similar to the one below. Record the main separation ticket number before saving the sub-ticket.

Main separation ticket:

1. Reclaim Card Key
2. Remove separating employee’s phone number from Call Center
3. Disable Citrix Access Gateway
4. Reclaim Cell Phone
5. Disable Cisco VPN
6. Update Caller ID on Desk Phone
7. Reclaim Pager
8. Disable Voice Mail and hold for 7 days.



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9. Coordinate with separating employee's manager to access Voice Mail.
10. Coordinate with separating employee's manager redirect phone calls for 7 days.
11. Reclaim Wireless Card

Appendix F (DCTN Separation Ticket Checklist):

The Quick Pick “Employee Separation (DCTN)” should populate with a checklist similar to the one below. Record the main separation ticket number before saving the sub-ticket.

Main separation ticket:

1. Change global passwords

Appendix G (GISI Separation Ticket Checklist):

The Quick Pick “Employee Separation (GISI)” should populate with a checklist similar to the one below. Record the main separation ticket number before saving the sub-ticket.

Main separation ticket:

1. Disable access to ARCGIS
2. Disable access to CivicaSoft
3. Disable access to RLI and ARCSDE
4. Disable access to FTP Server
5. Update GIS software inventory