> *Introduction*: This document is designed to facilitate departmental planning of Office 365-related data management related to employee off-boarding. When an employee departure from UWM service is imminent, that employee's department must act promptly to protect any business-required Office 365 data in that employee's account. The urgency for action is further heightened when the circumstances entail high-profile employees and/or high-risk data.

(1) Employee name:

(2) Status/circumstances of departing employee:

Resignation:
Retirement:
Termination for cause:
Emeritus:
Annuitant:

> **Considerations:**
> - Terminated-for-cause employees: legal holds may be placed on the accounts of such employees.
> - Emeritus staff employees: such employees continue to have access to campus IT services, including e-mail.
> - Annuitant employees: such employees may request continued access to their ePantherACCOUNTs.

(3) Expected departure date of employee:

> **Considerations:** Office 365 data purges are undertaken on a *biannual basis* -- in *January* and *June*. Accounts of former employees are identified for the January data purge during the preceding mid-April through mid-November time period. Accounts of former employees are identified for the June purge in the preceding mid-November through mid-April time period. From year to year, the precise dates of the "account purge identification period" and the data purges may be subject to some minor variance. Accordingly, Office 365 data management plans for employees departing in April should plan for the June data purge date.

(3) Which Office 365 tools have been used by the employee?

E-mail:
Calendar:
Contacts:
OneDrive:

> **Considerations:** When the employee's account is decommissioned, ***all Office 365 data*** associated with the employee's Office 365 account is comprehensively "purged." This data purge includes all emails, contacts, OneDrive files, and calendar entries.

(4) **Which**, if any, business-required data in the employee's Office 365 account **requires retention**?

E-mail:
Calendar:
Contacts:
OneDrive:

Considerations: Electronic documents, like their paper counterparts, may be records and must be scheduled, retained, and disposed of properly. Some of the most common questions about electronic records at UWM are addressed here: http://uwm.edu/libraries/archives/uwm-records-management/electronic-records/

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(5) **Who** will implement the Office 365 data retention, if required?

Considerations: Depending on (a) the nature and scope of the data that requires retention, (b) the circumstances of the employee's departure, and (c) the employee's technical aptitude, the ***individual employee*** may be able personally to implement the required data retention. If not, ***professional IT support*** may be required. IT support at UWM varies by division/school/college. To determine if your unit has local IT Support, consult: https://www4.uwm.edu/technology/help/local/index.cfm

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(6) **How** will Office 365 data retention be technically implemented, if required?

Considerations: Different general approaches to data storage and archiving may be undertaken: On-Line, Near-Line, and Off-Line. These approaches are detailed here:
- http://uwm.edu/libraries/archives/uwm-records-management/e-mail-management/

The process of ***exporting Office 365 email*** is detailed here:
- https://kb.uwm.edu/page.php?id=46035

The process of ***updating the ownership of Office 365 shared mailboxes*** is detailed here:
- https://kb.uwm.edu/page.php?id=42061

The process of ***archiving e-records*** is reviewed here:
- http://uwm.edu/libraries/archives/uwm-records-management/e-records-transfers/

Though not directly entailing "data retention" per se, other Office 365 business process-related actions to be taken by a departing UWM employee are detailed here:
- https://uwm.edu/iam/epanther-account-deprovisioning/

These include actions related to: (a) Office 365 ***Calendar Resource scheduling*** and (b) ***pantherLIST e-mail list ownership***.