

Faculty Offboarding To-Do List

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Before You Start:

This article is for Faculty who are removing themselves from Wharton technology resources.

Contact [Client Support Services](#) with any questions.

Wharton Computing is here to ensure that your technology transition, whether you're concluding a teaching appointment or shifting roles, is as seamless as possible. We've created a checklist to help you manage your email, data, and account access, along with key dates to be aware of regarding account changes or closures.

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Review Account Closing Dates

Your access to Wharton and Penn online services ends shortly after your Penn/Wharton appointment has concluded.

Prepare Your Email for Transition

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Your O365 Wharton account (Microsoft Office, Email, OneDrive, etc.) access concludes on the date your PennID account is set to expire. Please consult with your Department Business Administrator to confirm your PennID expiration date.

1. Set a Change of Address Notice

Set an **Out of Office** message providing both your alternate professional email address and your personal email address.

2. Begin Forwarding

You may **forward** your Wharton e-mail to a personal account while your Wharton email is still active.

Please contact **Client Support Services** for assistance.

3. Transfer Your Emails

Transfer your Wharton emails to a personal account. We suggest starting this process once the end date on your appointment has been confirmed. Please contact **Client Support Services** for assistance

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Special Considerations for Office 365

We recommend signing out of Email / Office 365 **before your last day** so you have an opportunity to check and see if any important information will disappear. This gives you a little time to find out and take any steps necessary.

- Look at your phone and personal computer to verify that **contacts and calendars are NOT syncing** to Penn O365.
- Make sure everything you want to keep is **moved to a different account**, as that information will disappear when your account is turned off.

Manage Mailing Lists

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Before you leave campus, unsubscribe from any mailing lists you're currently on. If you are the owner of a mailing list(s), identify and assign a new owner for the list. (Please contact **Client Support Services** for assistance if needed).

Unsubscribe

1. Navigate to the **Mailing List App**.
2. If prompted, **log in** with your PennKey credentials.
3. Choose the **My Membership** tab.
4. Click **Unsubscribe** for each mailing list.

Transfer Ownership

1. Navigate to the **Mailing List App**.
2. If prompted, **log in** with your PennKey credentials.
3. Choose the **List Ownership** tab.
4. Click **Edit List** for each mailing list.
5. **Add** any new owners and **remove** yourself.
6. Click **Submit Changes**.

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Save Data You Want to Keep

Save data you'd like to keep before you lose access. Use these links to get started.

Wharton Google Drive



G Suite

[Read More ?](#)

Canvas



[Read More ?](#)



[Read More ?](#)

Personal Network Drive and Locally Stored Data



[Read More ?](#)

OneDrive & OneNote



[Read More ?](#)

Dropbox



[Read More ?](#)



[Read More ?](#)

Additional Backup Options



[Read More ?](#)

Physical Office (Computer, Phone, and Loans)

Cleaning out your office can loom large. Here are steps to help make it easier.

- **Phone** - Offer to assist with assigning the phone number back to the Business Administrator, delete your voicemails, and reset the greeting.
- **Office Computer** - Back up / remove all files from your office computer or any other device that belongs to Wharton and make sure they are returned prior to your departure.
- **Loans** - Please return all hardware loaner equipment.
- **Keys** - Please return any keys to the Business Administrator

Clean up your Personal Devices

When you leave Wharton, your permissions to use certain software changes. These steps will help you update your devices.

Remove or sign out of the following to prevent unpredictable errors later when your permissions are removed:

- **Network Services** - Global Protect, FortiClient, network printers, and network drives
- **Penn Security Software** - DuoMobile, Dashlane, Symantec, or Sophos
- **Penn Cloud Storage** - Penn Box, Penn DropBox, Penn OneDrive
- **Productivity Software** - Penn Office 365, Email, Contacts, Calendar
- **Meeting Software** - Zoom, Mersive Solstice, Slack, and Teams
- **Penn Specific Apps on Devices** - Penn Guardian, WorkDay, YouDecide

Website / Online Identity

Websites at Wharton are updated regularly. Take steps to ensure your information is up to date, and you have copies.

Faculty Photo: Make a copy of your Faculty profile picture from your Departmental web page profile.

Copy of Bio: Make a copy of your biography from the departmental website.

Teaching Resources

Once you leave Wharton, you may not have access to teaching resources you used while you were on campus.

- **Canvas Sites:** If you have taught classes, consider **backing up Canvas sites** you may need in the future.
- **Teaching Videos:** You may need teaching samples for a job search. Consider downloading a Panopto video of yourself teaching. Learn about **how to access class recordings**.
- **Teaching Evaluations:** Download and save any teaching evaluations. They can be found in the **U@Penn Portal** under **Student Advising & Admin Resources -> Faculty & Advisors -> My Course Evaluations**

Research Computing Resources

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When your Pennkey expires you will no longer be able to access your Wharton HPC3 or Wharton AWS WorkSpace resources.

If you *do* have resources (code or data) on Wharton HPC3 or WorkSpace systems that you would like to keep, please take some time at your earliest convenience to copy it elsewhere, for example to your personal Dropbox, Box, or your new institution's computing resources. We recommend **rclone** for straightforward syncing to the cloud.

If you have questions or concerns, please [let us know how we may assist](#).

Questions? Contact Us

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If you have any questions regarding the contents of this article please contact [Client Support Services](#).
