SECTION:	Operations	
ID NO.:	OPI-9-107	
PAGE:	**1** of 8	
ISSUE DATE:	January 27, 2021	
ISSUE.REVISION:	1.0	
REVISION DATE:	January 27, 2021	
APPROVED BY:	IS Authority	

Ontario ⟁

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

---

Policy:

Trillium Gift of Life Network's (TGLN) Information Technology (IT) Department is responsible for ensuring TGLN's IT assets are deployed and that access to TGLN's IT systems and infrastructure are granted when staff have been onboarded. Similarly, TGLN IT is responsible for ensuring TGLN's IT assets are returned and that access to TGLN's IT systems and infrastructure is revoked when staff have been offboarded. For stakeholders which have access to TGLN's IT systems and infrastructure, they too are onboarded and offboarded in bulk on a periodic basis as notified by the appropriate responsible department. On a case-by-case basis, offboarding is temporary and limited in scope, such as leaves of absence, as determined by TGLN management.

Process:

Onboarding

Notification of new hire/change of position

1. Human Resources (HR) will notify ServiceDesk and the hiring manager via email. HR includes the new hire form for the manager to complete and submit to the ServiceDesk. This email automatically generates a ticket in the IssueTrak System.

2. The hiring manager completes the new hire form and submits it to ServiceDesk. If ServiceDesk does not receive this form in a timely manner, they will send a reminder to the hiring manager prior to the new hire's start date. This email generates a new ticket in the IssueTrak System.

3. ServiceDesk copies the form received to the HR ticket and closes the ticket generated by the hiring manager.

4. ServiceDesk fills out the *IT Onboarding Checklist, OSF-9-3 (Exhibit 1)* and forwards it to the hiring manager for confirmation and adjustments.

5. The hiring manager reviews the *IT Onboarding Checklist* and returns it back to the ServiceDesk Department.

6. ServiceDesk issues tasks from the ticket to Application Development (AppDev), Infrastructure and Operations (IO) and itself based on the items indicated on the *IT Onboarding Checklist*.

	SECTION:	Operations
	ID NO.:	OPI-9-107
	PAGE:	**2** of 8
	ISSUE DATE:	January 27, 2021
	ISSUE.REVISION:	1.0
	REVISION DATE:	January 27, 2021
	APPROVED BY:	IS Authority

Ontario ⚜

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

Infrastructure Steps

7. IO creates the user account for the user in Active Directory (AD). The username is always lastname first initial. IO will forward this username to the Application Development (AppDev) department to create usernames in AppDev supported applications. IO completes any other actions required by them as indicated in the task.

8. IO completes their task in IssueTrak system.

Application Development Steps

9. AppDev gives access to TOTAL and iTransplant as per the user matrix for each program.

10. AppDev completes any other actions assigned to them in their task.

11. App Dev completes their task in IssueTrak.

ServiceDesk Steps

12. ServiceDesk sets up the user in BroadConnect (BCT-MyPBX). For non-Provincial Resource Centre (PRC) users, they are provided with a generic extension. For PRC members they are provided with an extension beginning with the number 8 (for the Tissue Department) or 9 (for the Organ Department). PRC members are also given access to the AgentPortal and IPrecorder system.

13. If a cellphone has been requested by the hiring manager, ServiceDesk aquires a cellphone and SIM card.

14. ServiceDesk records all hardware issued to the new user in Smartsheet. This includes hardwired phones and computers.

15. ServiceDesk will inventory computer with installed software using the PDQ tool.

16. ServiceDesk completes any other actions indicated in the task.

17. ServiceDesk completes their task in IssueTrak.

18. ServiceDesk sends email to new employee with BroadConnect (BCT) Communicator training guide.

	SECTION:	Operations
	ID NO.:	OPI-9-107
	PAGE:	**3** of 8
	ISSUE DATE:	January 27, 2021
	ISSUE.REVISION:	1.0
	REVISION DATE:	January 27, 2021
	APPROVED BY:	IS Authority

Ontario ⟁

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

19. ServiceDesk provides any in-person training deemed necessary on their first day on-the-job.

Offboarding

Notification of Termination

20. Human Resources (HR) will notify ServiceDesk of an employee termination via email or verbally depending on the circumstance of the employee's termination. Verbal notification only occurs if the employee is being terminated immediately to initiate the offboarding processes as soon as possible with the email notification being sent to ServiceDesk shortly after the employee has been immediately terminated.

21. Person's designated throughout the organization are responsible for informing ServiceDesk via email when stakeholders are no longer with their organisations and require to be offboarded from TGLN's Infrastructure and Systems. The following staff are the designates for these activities:

    - Information Coordinator – Transplant are responsible for transplant program coordinators and human leukocyte antigen (HLA) lab access to TOTAL and secure file transfer protocol (sFTP)
    - Transplant Connect Liaison – iTransplant Access of Serology Labs, Transplant Support Physicians, Regional Medical Liaisons, and Donation Support Physicians

22. Once an email is sent to ServiceDesk, it creates a ticket in ServiceDesk's IssueTrak system. In the case of immediate termination, ServiceDesk creates the ticket on behalf of the HR department which it merges with the ticket generated by HR once it is received.

23. The manager responsible for the terminated staff submits the termination form and emails it to ServiceDesk. This also creates a ticket automatically in the IssueTrak system which needs to be merged with the original ticket created when HR sent the termination email to ServiceDesk.

24. ServiceDesk populates the *IT Offboarding Checklist, OSF-9-4* (Exhibit 2) with information that was provided on the IT Onboarding Checklist (if applicable) and the termination form.

25. ServiceDesk forwards the IT Offboarding Checklist to the responsible manager for review and adjustments.

SECTION: Operations
ID NO.: OPI-9-107
PAGE: **4** of 8
ISSUE DATE: January 27, 2021
ISSUE.REVISION: 1.0
REVISION DATE: January 27, 2021
APPROVED BY: IS Authority

Ontario ☘

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

26. The responsible manager reviews the IT Offboarding Checklist and returns it back to the ServiceDesk Department.

ServiceDesk Steps

27. ServiceDesk creates the following tasks to be completed by Application Development (AppDev), Infrastructure and Operations (IO) and ServiceDesk itself.
    - AppDev is assigned a task to block access to iTransplant and TOTAL, as applicable
    - IO is asked a task to change the password for Active Directory (AD) account, sets an out-of-office notification, deactivation of account, server access and blocks access to sFTP, as applicable
    - ServiceDesk is assigned a task to retrieve hardware (laptop, cellphone, pager), as identified in SmartSheet
    - ServiceDesk is assigned a task to remove licenses (i.e. SAAS, Tableau, Office, TOAD, Visual Studio, etc.) as identified by PDQ Software. Note: PDQ Software is used to audit an employee's computer for software installed. This is not required for external staff as their installed software is pre-defined.
    - ServiceDesk is assigned a task to remove access to BroadConnect Systems (i.e. IP Recorder, Archive Tool, Agent Portal, etc.)
    - Any other actions as indicated on the *IT Offboarding Checklist.*

28. ServiceDesk makes the following exceptions to the above tasks in the listed situations
    - Maternity/Parental Leave employees are only required to return assigned hardware. All other access remains in place.
    - Sick Leave employees retain all hardware and access with ServiceDesk just noting the time of the leave in the IssueTrak system.
    - Change of role and remains in the same department employees have their access modified as requested by their departmental manager as deemed necessary. New access and hardware requested is handled by the onboarding process.
    - Change of role and changes department employees only have access and hardware removed as specified by their former manager.

29. Employee managers are responsible for ensuring the hardware of onsite and offsite employees return hardware. ServiceDesk will provide an email to the manager and/or employee of the hardware that requires return. If the hardware is not returned promptly, ServiceDesk will follow-up with the employee's manager and HR on up to three occasions

SECTION: Operations
ID NO.: OPI-9-107
PAGE: **5** of 8
ISSUE DATE: January 27, 2021
ISSUE.REVISION: 1.0
REVISION DATE: January 27, 2021
APPROVED BY: IS Authority

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

within a three-month period after the employee has been terminated to retrieve the hardware before giving up.

30. ServiceDesk obtains the hardware, wipes the data from the hardware and then prepares the hardware for redeployment. In instances where the hardware is not returned, ServiceDesk will mark the item(s) as lost, wipe the cellphone, disable the SIM cards (of the cellphone and the laptop) and blacklist the IMEI of the cellphone, as applicable. If the non-returned hardware item was assigned to an off-site employee, ServiceDesk will also determine when the last time the cellphone was used and/or laptop was logged into for tracking purposes.

31. ServiceDesk will then complete the task assigned to them in the IssueTrak system

32. ServiceDesk Lead will follow-up with other outstanding tasks to ensure they are completed in a timely manner.

Application Development Steps

33. AppDev will inactivate users identified in iTransplant and TOTAL by the task.

34. AppDev completes any other actions assigned to them and completes the task assigned to them in the IssueTrak system

Infrastructure Steps

35. IO will change the password to the AD account in order to block access to TGLN systems, but still keeps systems using the terminated employee's AD account running.

36. Unless specified by HR, IO will be assigned a task to archive the terminated employee's email account within 30 days of the termination date notification. If specified otherwise, IO will check their tasks monthly to determine if they have any outstanding tasks to complete. IO archives the email account on the required date.

37. IO completes any other actions assigned to them and completes the task assigned to them in the IssueTrak system.

38. IO inactivates the AD account as early as the termination date, but may delay this depending on what the employee had access to and what they used their AD account to operate.

SECTION: Operations
ID NO.: OPI-9-107
PAGE: **6** of 8
ISSUE DATE: January 27, 2021
ISSUE.REVISION: 1.0
REVISION DATE: January 27, 2021
APPROVED BY: IS Authority

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

39. IO will audit the employee's AD user account access (i.e. SQL Server, Oracle, Cognos, etc.) and remove the user from distribution lists, security groups and file share access.

Records:

Record Name	Form No. (if applicable)	Record Holder	Record Location	Record Retention Time (as a minimum)

None

References:

- *None*

SECTION:	Operations
ID NO.:	OPI-9-107
PAGE:	**7** of 8
ISSUE DATE:	January 27, 2021
ISSUE.REVISION:	1.0
REVISION DATE:	January 27, 2021
APPROVED BY:	IS Authority

Ontario ☘

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

Exhibit 1: Sample IT Onboarding Checklist

Trillium Gift of Life Network

IT Onboarding Checklist   OSF-9-3

Name of Onboarded staff:

Department:

Position:

Date of Hire:

Infrastructure

Applicable		Complete?	Task
Yes	No		
			Create AD account with universal password. Username must be last name and first initial (as this impacts reporting by the Informatics group)
			Activate sFTP account
			Create exchange account
			Add AD user from server access (i.e. SQL Server, Oracle, Cognos, etc.)
			Add user to distribution lists, security groups and file share access.
			DBA Access (Oracle and SQL Server)

ServiceDesk

Applicable		Complete?	Task
Yes	No		

	SECTION:	Operations
	ID NO.:	OPI-9-107
	PAGE:	**8** of 8
	ISSUE DATE:	January 27, 2021
	ISSUE.REVISION:	1.0
	REVISION DATE:	January 27, 2021
	APPROVED BY:	IS Authority

Ontario ☘

Operations Process Instruction Manual

Information Technology – Onboarding/Offboarding Staff and Stakeholders Process Instruction

Exhibit 2: Sample IT Offboarding Checklist

Trillium Gift of Life Network

IT Offboarding Checklist

OSF-9-4

Name of offboarded staff:

Date of Termination:

Date of AD account deactivation:

Infrastructure

Applicable		Complete?	Task
Yes	No		
			Change AD account Password
			Set out of office email
			Deactivate sFTP account
			Deactivate AD account at prescribed time
			Archive exchange account
			Remove AD user from server access (i.e. SQL Server, Oracle, Cognos, etc.)
			Remove user from distribution lists, security groups and file share access.
			Remove DBA Access (Oracle and SQL Server)

ServiceDesk

Applicable		Complete?	Task
Yes	No		
			Retrieve laptop/computer