OIT Guideline for Box Account Management

Employee Separation

When an employee separates from the university, managers are responsible for ensuring UC Merced records stored in the employee's Box account remain accessible for business continuity, instructional and/or research functions, and record retention compliance.

OIT is providing the following guidelines and procedure to assist managers with ensuring accessibility to Box records. These guidelines set forth the options OIT offers to manage Box accounts in different scenarios when an employee leaves UC Merced or transfers to another department.

In each scenario, the employee's Box account can be changed to one of the options listed below. Whichever option(s) is selected, please follow the procedure specified.

PLEASE NOTE THE FOLLOWING:

- A request to retain and provide access to a separating or terminated employee's Box account must be submitted within 30 days of the employees last day of work.
- A request prior to an employee's separation date, must comply with the Electronic Communications Policy (ECP).
- Requests submitted to OIT will be processed within 0-3 business days. Terminations will be processed as outlined in the following scenarios.
- Please include any questions regarding the options or the procedure when submitting the OIT request or contact the OIT Service Desk for assistance.

To view the options available, select the scenario that best describes the situation:

- Employee is voluntarily separating from UC Merced
- Employee is transferring to a new position within UC Merced
- Employee is separated for cause

Scenarios

EMPLOYEE is voluntarily separating from UC Merced		
Guideline: When an employee voluntarily separates from UC Merced, *managers* are responsible for ensuring UC Merced records stored in the employee's Box account remain accessible for business continuity, instructional and/or research functions, and record retention compliance.		
OPTIONS	CONSIDERATIONS	PROCEDURE
Close Box Account	IF NO action occurs upon separation, the Box account will not be deactivated. Content may continue to be accessible to the original content owner.	Manager submits an OIT request. Include the following information: • Use the following in the description: "Employee Separation: Box Account Closure" • Employee's name • Employee's email address • Effective date of separation
Delete content	Deletes all owned content within the account's owned folders. Content that was shared to the separating person will not be affected.	Manager submits an OIT request. Include the following information: • Use the following in the description: "Employee Separation: Box Account Deletion" • Employee's name • Employee's email address • Effective date of separation
Transfer content	If continued access to the separating employee's owned folder(s) is needed, the contents may be transferred to any valid UC Merced Box account holder. The separating staff Box account will be closed and deleted in the process.	Manager submits an OIT request. Include the following information: • Use following in the description: "Employee Separation: Box Content Transfer" • Employee's name and email address • Name and email of person receiving content • Indicate employee consent status • Effective date of separation This can occur before or after the employee separation date.
Active Student	Active students are allowed to retain their Box accounts. Separating student workers may need to have access removed. Governing permissions to specific departmental content is the responsibility of the department folder owner(s).	Folder owner: • List your Box "All Files" • Click on the ⋯ button, then "More Actions" and then "Manage Collaborators" • Assign/remove ownership or access as needed • Change the separating staff permission to "Remove"
Alumni	Alumni are treated the same as regular separating faculty and staff. They do not retain their UC Merced Box account.	Please refer to this table for deletion or transfer of Box files just as you would for regular employees.

NOTE:
Requests submitted to OIT will be processed within 0-3 business days.

EMPLOYEE is terminated for cause

If a security concern exists regarding the employee's ongoing access to University information assets, the supervisor should contact the Chief Information Security Officer or CIO by phone to discuss the need for immediate de-provisioning of an individual's UCM NetID used to authorize employee access to all online resources and services. In such cases, the Unit Head is responsible for ensuring that the employee's access is appropriately controlled and that all information technology devices owned by UC Merced and used by the employee are returned in a timely manner. Human Resources may also direct this action; however, Unit Heads should confirm with Human Resources which party is taking responsibility for completing the necessary steps to control access to information technologies and resources.

For Box accounts, the following options are available.

OPTIONS	CONSIDERATIONS	PROCEDURE
Disable Box Account	Prompt notification to OIT is important in these situations to limit access.	For deactivation, the supervisor should immediately contact the Chief Information Security Officer or CIO by phone to discuss the need for immediate de-provisioning of an individual's UCM NetID.
Close Box Account	IF NO action occurs upon separation, the Box account will not be deactivated. Content may continue to be accessible to the original content owner.	Manager submits an OIT request. Include the following information: • Use the following in the description: "Employee Separation: Box Account Closure" • Employee's name • Employee's email address • Effective date of separation
Deletion of content	Deletes all owned content within the account's owned folders. Content that was shared to the separating person will not be affected.	Manager submits an OIT request. Include the following information: • Use the following in the description: "Employee Separation: Box Account Deletion" • Employee's name • Employee's email address • Effective date of separation
Transfer of content	If continued access to the separating employee's owned folder(s) is needed, the contents may be transferred to any valid UC Merced Box account holder. The separating staff Box account will be closed and deleted in the process.	Manager submits an OIT request. Include the following information: • Use following in the description: "Employee Separation: Box Content Transfer" • Employee's name • Employee's email address • Name of person receiving content • Effective date of separation This can occur before or after the employee separation date.
Active Student	Active students are allowed to retain their Box accounts. Governing permissions to specific departmental content is the responsibility of the department folder owner(s).	Folder owner: • List your Box "All Files" • Click on the ⋯ button, then "More Actions" and then "Manage Collaborators" • Assign ownership or access as needed • Change the separating staff permission to "Remove"
Alumni	Alumni are treated the same as regular separating faculty and staff. They do not retain their UC Merced Box account.	Please refer to this table for deletion or transfer of Box files just as you would for regular employees.

Requests submitted to OIT will be processed within 0-3 business days.

EMPLOYEE is transferring to a new position at UC Merced		
Guideline: When an employee transfers from one department to another, *releasing managers* are responsible for ensuring UC Merced records stored in the employee's Box account remain accessible for business continuity, instructional and/or research functions, and record retention compliance.		
OPTIONS	CONSIDERATIONS	PROCEDURE
Box Access Prior to Transfer	Access to department folders is manually assigned. It is the responsibility of folder owners to govern permission rights to Box content within their department.	Folder owner: • List your Box "All Files" • Click on the ⋯ button, then "More Actions" and then "Manage Collaborators" • Assign ownership or access as needed • Change the separating staff permission to "Remove"

References

Electronics Communications Policy

BFB-RMP-1: University Records Management Program

BFB-RMP-2: Records Retention and Disposition: Principles, Processes, and Guidelines

IDM User Guide

IS-3 Electronic Information Security

OIT Request