🚀 OIT Case File

✅ This case 🎙Record of Communication - OIT is closed.

TODO LIST: Completing a Case File

1. Make a copy of this Template
   - [x] Rename the page ClientFirstName-ClientLastName
2. Select the appropriate Banner (open/closed).
   - [x] Find your case's ticket on servicenow, and insert the link in the banner.
   - [x] Delete the extra banner. (open vs closed)
3. Add appropriate labels to this page:
   - [x] Add **one label per platform covered in the case** to link this case to the KB.
   - [x] Add a case label by ticket type, ONE of either **CASE-EOL or CASE-PM.**
4. Write a case summary in the excerpt.
5. Write a case overview.
   a. What does a future member reading your recommendations need to know about this client? What did you take notes on, what did your team discuss?
6. Link any supplementary pages relevant to this case (meeting notes, action plans, etc)
7. **Copy over emails from ServiceNow** and save each under this page as subpages.
   a. Use your discretion: what emails are worth saving, for someone to read and understand the EOL client case?
      - [ ] Add labels to the email pages, linking to email instructions & templates. see banners on example pages for specific labels (init-email, options-email, recs)

This template is a work in progress.. if you have any questions, ping Rory on slack!

Case Summary

Purpose: *Give a short overview of the case, including all necessary context to understand WHO the client was, WHAT they asked for, and the Recommendations. This will populate in the KB pages as the ONLY visible summary, and so* ***must be contained in the Excerpt.***

Instructions: *In the Excerpt*, describe the unique considerations about this case in a 1-3 sentence summary. List the platforms covered, and the features recommended, in short bulletpoints. .

This case involves fieldwork outreach to CU Boulder's Office of Information Technology to understand how the university handles faculty account access, continuity, and deprovisioning after death or incapacity. The clinic is working through a theoretical faculty case to ground its guidance in real CU policy and practice.

Platforms Covered:

- IdentiKey
- Microsoft Productivity Suite (email, OneDrive)
- MyCUInfo Portal
- Canvas and Academic Tools (pending)

Features Investigated:

- Delete / Deprovisioning
- Archive Account Data
- Transfer Ownership of Account
- Transfer Ownership of Data
- Stewardship
- Memorialization (confirmed Not Supported)
- Help Center Article About Death
- Automatic Deletion
- Two Factor Authentication

Case File Overview

> ***Purpose:*** Make sure future client members reading the case emails as reference material understand the unique context of your case. Talk about the decisions you made, in enough detail that a new member could pick up where you left off.
>
> **Instructions:** Walk future clinic members through your case: describe the clients' needs, wants, and your recs. Anchor your overview of the case in the email correspondence as relevant, and **link to the subpages with those emails.**

Who was this client? What did they want?

This is not a traditional EOL client case. This case documents fieldwork outreach to CU Boulder OIT as part of the clinic's effort to document how the university handles faculty digital accounts after death or incapacity. The goal was to ensure clinic guidance accurately reflects existing CU policy rather than assumptions.

Outreach was initiated through Kate Davis, a faculty member in the Information Science department, who introduced Kaeden Stander to Melinda at OIT. Melinda then looped in Jennie Brucker, who provided the most detailed responses throughout the correspondence.

The clinic asked three core questions to start:

- What documented policies guide CU's response when a faculty member becomes deceased or inactive?
- Which institutional roles are authorized to request changes to faculty digital accounts?
- What is the process for assigning access to active Canvas courses when an instructor is unavailable?

Clinic member's actions, considerations to meet those needs?

Kaeden sent an initial outreach email clarifying scope, confirming that the inquiry was focused on institutional continuity rather than spousal or personal access, and narrowing inactive to mean deceased or medically incapacitated faculty.

Jennie responded with an overview of the Acceptable Use Policy rewrite and confirmed that access after death is generally limited to supervisors or departments for business continuity, or Legal when necessary.

A follow-up email was sent asking about operational timelines for specific systems including CU email, OneDrive, and Canvas.

After no response, a follow-up nudge was sent.

Jennie responded with the following key findings:

- **IdentiKey:** Not automatically disabled after death. Requires a manual request from the department to the IT Service Center. Automation is planned but not yet in place.
- **Microsoft:** Automation launching late May 2026. License retained for 30 days from date of death entered in HCM. Departments can request access during this window. Account fully deleted after approximately 189 days.
- **MyCUInfo Portal:** Deprovisioned quickly after affiliation ends. Managed by University Information Systems in Denver, not OIT Boulder.
- **Canvas:** Outside Jennie's scope. Referred to Luke Prather (luke.prather@colorado.edu).

Jennie also noted a policy update: spouses and executors may be able to request limited access in certain situations with the dean and VC for IT or ISO sign-off. This is a change from her original position and is still going through legal review.

A further follow-up email has been sent asking two outstanding questions:

- Can the 30-day Microsoft window be extended by a manager or department?
- Is data permanently deleted or archived after the 189-day period?

Recommendations provided and motivations in context.

No formal recommendations have been provided to a client in this case. This is a fieldwork case. Findings are being used to build CU platform documentation across six categories for the clinic's knowledge base.

Important notes, challenges, and solutions?

Jennie works part-time which caused delays in responses. A polite follow-up nudge was required after one email went unanswered for an extended period.

The operational process at CU is not tightly documented. Jennie described it as "peeling back layers of the onion." Much of what was shared is directional rather than definitive, and some answers included qualifiers such as "I believe."

Canvas remains an open gap. Luke Prather has been identified as the next point of contact.

The Acceptable Use Policy rewrite is ongoing and the final version may change some of the information Jennie provided. Any documentation built from this fieldwork should note that it reflects CU policy as of Spring 2026 and is subject to change.

Supplementary Documentation

- Include any links to your Clinic Logs, EOL Action Plan folder, Etc, as related to this case.

Resource	Short Description	Link
Email thread with Jennie Brucker and Melinda (OIT)	Full record of communication from initial outreach through latest follow-up.	Record of Communication - OIT
CU Fieldwork Documentation Page	Full six-category platform documentation built from OIT fieldwork	CU V3

	findings covering Delete, Memorialization, Archive Account Data, Transfer Ownership of Account, Transfer Ownership of Data, and Stewardship.	

Clinic Members

Team Member	Contact Information	Role & Responsibilities
Kaeden Stander	kaeden.stander@colorado.edu	• Primary point of contact for OIT outreach • Documentation lead
Kate Davis	katherine.davis-4@colorado.edu	• Secondary point of contact for OIT outreach

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Case Handoff Information

The next clinic member picking up this case should:

- Follow up with Luke Prather at luke.prather@colorado.edu regarding Canvas deprovisioning.
- Await Jennie's response on the 30-day extension and 189-day data deletion questions.
- Monitor the CU Acceptable Use Policy rewrite for updates that may affect documented findings.
- Update the CU platform documentation page once Canvas information is confirmed.