

Third Party Supplier Offboarding Checklist

- Communicate anticipated changes to supplier relationship (i.e., contracted scope of services, replacement, insourcing, timelines) to impacted stakeholders and DVOC.
(BUSINESS OWNER)
- Get approval from the DVOC for changes to supplier relationship.
(BUSINESS OWNER)
- Provide Third Party with contractually prescribed notice of changes to relationship.
(BUSINESS OWNER)
- Assign Project Owner accountable for executing offboarding deliverables.
(BUSINESS OWNER)
- Consult with all impacted parties to document offboarding deliverables by functional area.
(PROJECT OWNER)
 - *TYPICAL OFFBOARDING DELIVERABLES (TRANSITION OF CARE, DATA RETENTION/DESTRUCTION, FILE EXCHANGE TERMINATION)*
- Open PPM to effectuate system changes.
(PROJECT OWNER)
- Create Business Requirements Document (BRD) that sets forth offboarding timeline, deliverables, and accountable parties.
(PROJECT OWNER)
- Conduct regular Status Meetings with Project Team (includes Relationship Management team, impacted Internal Stakeholders, functional Subject Matter Experts, and Compliance).
(PROJECT OWNER)
- Provide offboarding updates to impacted internal stakeholders and the DVOC.
(BUSINESS OWNER)