# Ending Employment Checklist - Campus Classified and Professional Staff

Employees and supervisors should review the following lists together to determine which items are applicable.

## Employee responsibilities

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| Notify department; submit letter of resignation: [ ]  Submit letter of resignation, including your termination date. [ ]  Notify your supervisor or HR Partner if you are transferring to another WA State agency.[ ]  Discuss with your supervisor whether you will be using any leave prior to your termination date.[ ]  Ensure all your leave requests have been entered and approved in Workday.  |

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| Return UW materials and equipment:[ ]  ID badge (Employees may retain their Husky Card: <https://hfs.uw.edu/Husky-Card-Services/Terms-and-Conditions>) [ ]  Building/departmental access cards or keys, keys for desk and office, and file cabinet keys [ ]  Electronics such as cell phone, pager, laptop [ ]  UW Travel Card (any outstanding balances must be paid in full by termination date)[ ]  Cancel by emailing uwcts@uw.edu with the name, last 4 digits of the account number |

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| **Technology and data access:**[ ]  Review the records management offboarding resource at: <https://finance.uw.edu/recmgt/Offboarding> [ ]  Provide supervisor with access necessary for records management of departmental data, documents, and other information or records, including those in email. [ ]  Discuss with supervisor whether an auto-reply email message to let others know you have separated should be set up, email forwarded to another employee, or both.[ ]  Cancel future meeting requests or holds in Outlook.[ ]  Update your voicemail message to advise callers of your separation and provide an alternate contact to call for assistance.[ ]  Provide supervisor with voicemail access code. Discuss with supervisor if your greeting should be updated.[ ]  Cancel ProCard by emailing procard@uw.edu, then destroy and dispose of ProCard. **Technology and data access continued:**[ ]  Remove any UW licensed software from your personal computer/device(s). |

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| Update Workday profile and payroll deductions[ ]  Update personal address in Workday for tax forms.[ ]  Contact Transportation Services to cancel UW parking permits, U-PASS, or other UW-transit options. You will continue to be charged for products that are not canceled.[ ]  Stop voluntary paycheck deductions.  |

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| **Additional information and considerations:**[ ]  Review information about insurance continuation: https://hr.uw.edu/benefits/insurance/health/cobra-continue-your-insurance/[ ]  If you wish to access retirement plan contributions, contact the UWHR Benefits Office at 206-543-4444 or benefits@uw.edu [ ]  Retirees must officially retire from the UW in order to obtain all rights and benefits. Contact the UWHR Benefits Office at 206-543-4444 or benefits@uw.edu.[ ]  If you are the parent of a child enrolled in a UW on-site childcare center, you must notify the center that you are separating from UW employment. |

Department responsibilities

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| Receive letter of resignation or notification of end date:[ ]  Confirm if employee is going to another state agency or transferring to a different UW department.[ ]  Discuss whether employee will be taking any leave prior to separation.[ ]  Ensure all leave requests have been entered and approved in Workday.[ ]  Transmit a copy of the resignation notice to campushr@uw.edu for records retention in the employee’s personnel file. |

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| Process termination in Workday:* Voluntary: <https://isc.uw.edu/user-guides/term_vol_sc/>
* Involuntary: https://isc.uw.edu/user-guides/term\_invol\_sc/
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| Receive UW materials and equipment from employee:[ ]  Receive all keys (office, building, desk, and file cabinets) and building access cards/badges.[ ]  Computer equipment, pager, cell phone, etc. Cancel data plan if applicable.[ ]  Collect UW Travel Card. |

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| Forwarding address:[ ]  If employee has not updated their personal contact information in Workday, their HR Partner may do so. |

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| Email:[ ]  Discuss whether employee should set up auto-reply email message to let others know they have separated, or have email forwarded to another employee. To forward email, contact UW-IT at help@uw.edu. [ ]  Alternately, manager can email aareq@uw.edu identify themselves as the supervisor of the employee; provide the employee’s name and NetID; and the wording of the requested subject line and message to be placed on the account. |

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| Voicemail:[ ]  Forward or change voicemail greeting; obtain voice mail password.[ ]  Alternately, manager can call the UWIT Service Center 206.221.5000 or email help@uw.edu to have the password reset. |

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| Ensure access to all departmental documents and data:[ ]  Determine location of electronic and paper records and data, including those in email. Take actions required for records management. Follow guidance in Records Management’s offboarding resource: <https://finance.uw.edu/recmgt/Offboarding>  [ ]  Obtain departmental system passwords and any document passwords.  |

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| Remove access to systems, update communications:[ ]  Remove access to departmental shared drives; NetID groups, SharePoint sites.[ ]  Update mail groups; distribution lists; recurring meeting attendee lists.[ ]  Remove specific systems access (e.g., UWHIRES, Advance, Student Database).[ ]  Update internal contact lists; external facing (web) contact lists. [ ]  Remove employee from electronic building access and building access rosters.[ ]  Review and request ASTRA authorization changes as needed <https://astra.admin.uw.edu/astra/>  |

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| **Cancel Procurement Card, Reconciler Account Access, UW Travel Card:**[ ]  Email ProCard cancelation requests to procard@uw.edu. The card and reconciler site access will be removed, but it is the cardholder's responsibility to destroy and dispose of the card. For additional information, see <http://finance.uw.edu/ps/how-to-buy/procard/resources#cancel> or call 206.543.5252. [ ]  Email Travel Card cancelation requests to uwcts@uw.edu including the cardholder’s name and the last 4 digits of the account number. For additional information, email uwcts@uw.edu or call 206.543.7171. |

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| Review and close department personnel file:[ ]  Retain documents as instructed in UW Records Retention Schedule: https://finance.uw.edu/recmgt/gs |