**Date:**

**NAME     \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  EMPLOYEE ID NUMBER**

**SEPARATION DATE JOB TITLE     \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\*Please note that the last day worked is the effective separation date\***

**DEPARTMENT     \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_  MANAGER    \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**MAILING ADDRESS     \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_  PHONE     \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_  EMAIL     \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**SEPARATION TYPE (CHECK ONE):**

**RESIGNING from HMC and UW System: (Complete Section 1)**

**LAYOFF from HMC and UW System: (Complete Section 1)**

**TRANSFERRING within HMC or UW System: (Complete Sections 1 and 2)**

**RETIRING: (Complete Sections 1 and 3)**

**\*\*MANAGERS: Please complete Section 4\*\***

This checklist is to assist you with the offboarding process. Please follow the steps below and check the boxes when each task is completed. Please return the completed checklist to keep in your employee department file by . Thank you for your service with Harborview Medical Center.

**Section 1: Employee Responsibilities**

Submit letter of resignation to your manager at least 2 weeks prior to your last day of work.

**Please note**: If you are transferring to another Washington State Agency, including the UW, Harborview Medical Center or UW Medical Center systems, please add the following information to your resignation letter:

* + - New Manager Name
    - Start Date in New Position
    - Name of Washington State Agency :

**HMC:**  **UW:**

**UWMC:**  **Other State Agency:**

Verify and update your contact information, including your personal email in [Workday:](https://wd5.myworkday.com/uw/login.htmld) Important documents, such as your final paycheck and IRS Form W-2, will be sent to your primary address.

Review your recent pay stub in [Workday](https://wd5.myworkday.com/uw/login.htmld) for any deductions you would like to stop. Refer to the [Payslip & Deductions](https://isc.uw.edu/your-pay-taxes/paycheck-info/#paystub-deductions) page for information and contacts

Review and revise your Benefits information in [Workday](https://wd5.myworkday.com/uw/login.htmld)

Review information about insurance continuation here: <http://www.washington.edu/admin/hr/benefits/insure/fac-staff-lib/cobra/index.html>

If you wish to access retirement plan contributions, please contact the Integrated Service Center (ISC) at (206) 543-4444 or [benefits@uw.edu](mailto:benefits@uw.edu)

If your child is enrolled in one of the University’s on-site childcare centers, you must notify the center that you are voluntarily terminating your UW employment.

Update the following information:

Set up an auto-reply email message to let others know you have terminated or forward your account to another employee. For instructions on setting up auto-reply messages, see <http://www.washington.edu/computing/faqs/html/email.autoreply>. To forward your email account to another employee or supervisor, see <https://uwnetid.washington.edu/manage/?forward>

Standard Message should include:

* Your separation date
* Who to contact for assistance with their phone number and email address

Email a test message to your manager/supervisor to ensure the auto-reply message works properly.

Unsubscribe from **email** and pager group lists

Update your voice mail message to advise callers of your separation and a number to call for assistance.

Standard Message should include the following:

* Your separation date
* Who to contact for assistance with their phone number and email address

Coordinate with your manager which active line to forward your voice mail to after your last working day, and provide him/her with your voice mail access code.

Move work files/products from personal drive and/or folders to a centrally-shared drives and/or folders

Contact the following departments:

**Parking**: You are responsible for notifying the Parking and Commuting Services when you leave the HMC/UW. Please visit their office at 8CT-70 to cancel deductions and return parking permits. Failure to do so could result in continuing parking fees after your separation. **NOTE:** If transferring within the HMC system, you do not need to take any action in regards to UPASS deductions or Staff/Husky Card.

ID badge (Employees may retain their Husky Card: <https://hfs.uw.edu/Husky-Card-Services/Terms-and-Conditions>)

If you have a **ProCard** or **Travel Card**, please return and deactivate the card by contacting the UW ProCard office at [procard@uw.edu](mailto:procard@uw.edu) and destroying the card(s).

Provide your supervisor with all department or HMC owned materials, including but not limited to:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Item Name | Item Information, ex. ID number | Return Date | Supervisor to  Return to: | N/A |
| HMC Photo ID/Name Badge/Keys |  |  | Photo ID/Badging Office, 8CT-70, BOX 359900 |  |
| HMC Parking Permit |  |  | Parking Office, 8CT-70, BOX 359901 |  |
| Locker Lock |  |  | Dept. manager or designate |  |
| Mobile Phone, Pager, International/Premium Long-Distance code or other Telecom products, |  |  | Communications Services, BEC-22, BOX 359707 |  |
| Laptop computer |  |  | Dept. manager or designate |  |
| Travel VISA Card | Last 4 digits: |  | Email cancelation to [procard@u.washington.edu](mailto:procard@u.washington.edu), then destroy card |  |
| ProCard | Last 4 digits: |  | Email cancelation to [procard@u.washington.edu](mailto:procard@u.washington.edu), then destroy card |  |
| Drives (Jump, Pen, Flash, etc.) |  |  | Dept. manager or designate |  |
| DUO token |  |  | ISC, BOX 359555 |  |
| Other: |  |  |  |  |
|  |  |  |  |  |

Reimburse medical center for any hotel deposits and/or prepaid conference registrations in which you did not attend.

Submit final timesheet to supervisor.

You will need your UWNetID and password. Other options: in-person or phone call with your Human Resources Consultant at (206) 744-9220.

Turn in this Employee Separation Checklist to  on

**Section 2: Transferring from HMC to another HMC Department or UW Department**

**(Complete Sections 1 & 2)**

Go to the Benefits website at <http://www.washington.edu/admin/hr/benefits>

**NOTE:** Employees transferring directly within the UW to another benefits eligible position do not need to take any action in regards to their benefits unless there is a change in employee status (i.e., from classified staff to professional staff).

Contact the following departments:

If transferring from HMC to another HMC department, complete new request for Photo ID (blue card). Visit the HMC Badging Office (8CT-70) to update Photo ID / Name Badge with new job title and department name.

If transferring from HMC to UW department, visit the HMC Parking and Commuter Services Office (8CT-70) to stop deduction for UPASS and parking. Return Photo ID Badge.

**Section 3: Retirement from HMC / UW System (Complete Sections 1 & 3)**

**Note: Have you determined that you are eligible for UW Retirement?**

Learn the rules and process associated with your retirement plan. Retirees must officially retire from the UW in order to obtain all rights and benefits, and should contact the ISC at (206) 543-4444 or [benefits@uw.edu](mailto:benefits@uw.edu) for more information. Also visit <http://hr.uw.edu/benefits/retirement-plans/nearing-retirement/>on rules, process, and more information on Prepare to Retire.

Write to the Department of Retirement Systems <http://www.drs.wa.gov/member/systems/pers/>within six (6) months of your projected retirement date to request an estimate of your retirement benefit and the PERS Retirement Income Options forms. Complete and return forms to DRS.

Complete your [retiree insurance forms](http://hr.uw.edu/benefits/retirement-plans/nearing-retirement/) and return to the State Health Care Authority within 30-60 days of your retirement date.

**Section 4: Manager’s Responsibilities**

**Resignation letter**: File resignation letter received from terminating employee into department file. Confirm whether or not the employee is terminating employment with the UW/UWMC or transferring to another UW or UW Medical Centers department.

Submit the online [**Status Change Form**](https://one.uwmedicine.org/hr/WMS/Pages/StatusChangeFormInfo.aspx) . Please provide a copy of the resignation letter to HMC Human Resources at [hrhmc@uw.edu](mailto:hrhmc@uw.edu) and UW Medicine Payroll Services at [uwmpay@uw.edu](mailto:mcpayroll@uw.edu) within one business day upon receipt of resignation letter.

Confirm medical center has been reimbursed for any hotel deposits and/or prepaid conference registrations in which employee did not attend.

Audit relocation overpayment and notify UW Medicine Payroll Services if necessary.

Confirm employee’s auto-reply message is active and accurate.

Verify phone line has been forwarded to another active line and/or obtain voice mail passcode.

Final time sheet completed.

Obtain all HMC/UW-issued property from the employee including any UW equipment which may be at residence. Please see Section 1: Employee Responsibilities.

**Cancel/Remove Access to:**

Fill out online UW Medicine Account Deactivation form at [UW Medicine Account Activation Request Form](https://services.uwmedicine.org/oip/form/deactAccount.jsp)

Notify credentialing office (if applies) of separation [omsa@uw.edu](mailto:omsa@uw.edu). For more information call 206.543.1002

Remove access to HBI and PCM by emailing IT Services Help Desk at [mcsos@uw.edu](mailto:mcsos@uw.edu)

Remove access to PMM/HEMM by emailing [pmmhelp@uw.edu](mailto:pmmhelp@uw.edu)

Remove access to records retrieval by emailing UW Medicine Records Management at [hrc@uw.edu](mailto:hrc@uw.edu)

Remove from other department systems and email lists

If the employee separating from UWMC is a manager or an administrator, please remove them from the HMC ABC list ([hmcabclist@uw.edu](mailto:hmcabclist@uw.edu)) by contacting Jennifer Uy, [jauy@uw.edu](mailto:jauy@uw.edu) .

To cancel and return telecom equipment (phones, pagers, etc), complete the following [form](https://hmc.uwmedicine.org/BU/CommunicationServices/MobileDevices/Documents/Form%20-%20Equipment%20Return%20Receipt.pdf) and fax to Communication services at 206-744-8686 or [hmctcomm@uw.edu](mailto:hmctcomm@uw.edu)

Cancel ProCard or Travel Card by emailing UW Procurement Office at [procard@uw.edu](mailto:procard@uw.edu)

Standard message should include the following:

Employee Name

Employee Identification Number

UW Net ID

Effective Date

Note type of separation, i.e. Resignation, transfer to another department

Current Manager’s Name and Contact information

**NOTE**: New department is responsible for setting up access as appropriate

File completed and signed copy of Employee Separation Checklist in the Department file, completion of the checklist ensures that the employee is closed out of the various UW systems.

Audit employee’s department file and forward to Human Resources at BOX 359715, attention: File Coordinator. Human Resources will archive the file, for the purposes of archiving please include the file folder.

If the employee is transferring to another HMC or UWMC department, forward employee’s department file to new department. If you don’t know where to send the file, forward to Human Resources at BOX 359715, attention: File Coordinator and note that it’s a transfer. Human Resources will forward to the correct department.

Please sign below to acknowledge completion of all applicable sections. Please note that your last day worked is your effective separation date.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature Date Manager Signature Date