

## Employee Separation Checklist

### Harborview Medical Center

#### Instructions

**Thank you for your service with Harborview Medical Center.** This checklist is intended to assist employees with the offboarding process. Please follow the steps below and check the boxes when each task is completed. Please return the completed checklist to: \_\_\_\_\_. This document will be kept in your employee department file by: \_\_\_\_\_. If accommodation is needed in this form, please contact your leave and accommodation specialist.

#### Employee information

1. Employee name:
2. Employee ID:
3. Termination date:
4. Job title:
5. Department:
6. Manager:
7. Phone:
8. Email:
9. Mailing address:

#### Separation type

- ☐ 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 complete section 4)

## Section 1: Employee Responsibilities

- ☐ Submit a letter of resignation to your manager at least 2 weeks prior to your last day of work. If you are transferring to another Washington state agency, including the UW, HMC or UWMC, please add the following information to your resignation letter.
  - New manager's name:
  - Start date in new position:
  - Name of Washington state agency:
    - HMC                      UWMC                      UW                      Other agency:
- ☐ Verify and update your contact information, including your personal email in Workday. 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 for any deductions you would like to stop. Refer to the Payslip & Deductions webpage for information and contacts.
- ☐ Review and revise your Benefits information in Workday.
- ☐ Review information about [insurance continuation](#).
- ☐ If you wish to access retirement plan contributions, please contact the Benefits office 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 separated or forward to your account to another employee. The standard message should include your separation date and who to contact for assistance with their phone number and email address. See the [ASA-IS Knowledgebase](#).
- ☐ 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. The standard message should include your separation date and 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 or folders to centrally shared drives or folders
- ☐ Parking: You are responsible for notifying the Transportation Services when you leave UW. Please visit their office to cancel deductions and return parking permits or email [ucommute@uw.edu](mailto:ucommute@uw.edu). Failure to do so could result in continuing parking fees after your separation. If transferring within the UWMC system, you do not need to take any action regarding UPASS deductions or Staff/Husky Card.
- ☐ ID badge: Please return your hospital ID badge to your manager. (Employees may retain their Husky Card in accordance with the [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	Information (IDs)	Return date	Supervisor to return to:	N/A
HMC Photo ID/Name Badge, Keys, Key/Proxy Cards			Public Safety/Parking Office, 8CT-70, BOX 359900	
HMC parking permit			Parking Office, 8CT-70, BOX 359901	
Locker lock			Dept. manager or designate	
Mobile Phone, Pager or other Telecom products, International/Premium Long-Distance code			Communications Services, BEC-22, BOX 359707	
Laptop computer			Dept. manager or designate	
Travel VISA Card	Last 4 digits:		Email cancelation to <a href="mailto:procard@u.washington.edu">procard@u.washington.edu</a> then destroy card	
ProCard	Last 4 digits:		Email cancelation to <a href="mailto:procard@u.washington.edu">procard@u.washington.edu</a> , then destroy card	
Drives (Jump, Pen, Flash, etc.)			Department manager or designate	
DUO token			UW-IT Service Center Box 354841, or recycle in an E-waste bin if no longer working	
Other:				

- ☐ Reimburse HMC for any hotel deposits and/or prepaid conference registrations in which you did not attend.
- ☐ Submit your final timesheet to your manager.
- ☐ Turn in this Employee Separation Checklist to: \_\_\_\_\_ by: \_\_\_\_\_.

## **Section 2: Transferring from HMC to another HMC Department or UW Department (complete sections 1 and 2)**

- ☐ Go to the Benefits website at [hr.uw.edu/benefits/](http://hr.uw.edu/benefits/). Employees transferring directly within the UW to another benefits eligible position do not need to take any action regarding 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 UWMC to another UWMC department, visit the UWMC Public Safety office (BB-120) to update the badge with the new job title and department name.
- ☐ If transferring from UWMC to HMC department, visit the HMC Badging Office (8CT-70) to update the badge with the new job title and department name. Please note that you will need to have the blue request card completed and signed by your manager before obtaining a new badge.

## **Section 3: Retirement from UWMC/UW System (Complete sections 1 & 3)**

### **Have you determined that you are eligible for UW Retirement?**

- ☐ Learn the rules and processes associated with your retirement plan. Retirees must officially retire from the UW to obtain all rights and benefits and should contact the Benefits office at (206) 543-4444 or [benefits@uw.edu](mailto:benefits@uw.edu) for more information. Also visit The [UWHR Nearing Retirement](#) webpage for rules, process, and more information on preparing to retire.
- ☐ Write to the [Department of Retirement Systems](#) within six 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](#) and return to the State Health Care Authority within 30 to 60 days of your retirement date.

## **Section 4: Manager responsibilities**

- ☐ Resignation letter: File resignation letter received from terminating employee into department file. Confirm whether the employee is terminating employment with the UW/HMC or transferring to another UW or UW Medicine department.
- ☐ Submit the online [Status Change Form](#) . 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:uwmpay@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 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 password.
- ☐ 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 Request form if terminating from UW Medicine or the UW Medicine Account Change Request form if transferring to another UW Medicine department at [UW Medicine Account Request Forms](#). For additional questions or assistance, please contact UW Medicine IT Services Help Desk at [uwmhelp@uw.edu](mailto:uwmhelp@uw.edu) or (206) 520-2200.
- ☐ Notify credentialing office of separation [omsa@uw.edu](mailto:omsa@uw.edu), if applicable. For more information call 206.543.1002.
- ☐ Remove access to HBI and PCM by emailing UW Medicine IT Services Help Desk at [uwmhelp@uw.edu](mailto:uwmhelp@uw.edu) or (206) 520-2200.
- ☐ 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 HMC 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).
- ☐ Cancel international/premium long-distance code by submitting the Telecom Support [Form](#)
- ☐ Cancel ProCard or Travel Card by emailing UW Procurement Office at [procard@uw.edu](mailto:procard@uw.edu). The standard message to UW Procurement should include the following:
  - Employee Name
  - Employee Identification Number
  - UW Net ID
  - Effective Date
  - Note the type of separation (i.e., Resignation, transfer to another department)
  - Current Manager's Name and Contact information**\*The new department is responsible for setting up access as appropriate**
- ☐ File the completed and signed copy of this 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 personnel file and contact Records & Information Governance at [hrc@uw.edu](mailto:hrc@uw.edu) for archiving of department personnel file.
- ☐ 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.

## Section 5: Acknowledgement

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

Employee signature and date:

Manager's signature and date: