

## Ending Employment Checklist: Campus Staff

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

### Employee responsibilities

#### Notify department; submit letter of resignation:

- Submit a 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.

#### Return UW materials and equipment:

- 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](mailto:uwcts@uw.edu) with the name, last 4 digits of the account number.
- ID badge (Employees may retain their Husky Card: <https://hfs.uw.edu/Husky-Card-Services/Terms-and-Conditions>).

#### 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 (e.g. move data/documents to a central file).
- 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](mailto:procard@uw.edu), then destroy and dispose of ProCard.
- Remove any UW licensed software from your personal computer/device(s).

**Update Workday profile and payroll deductions.**

- Update personal address in Workday for tax forms.
- Contact Transportation Services at <https://transportation.uw.edu/> 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. See <https://employeehelp.workday.uw.edu/your-pay-taxes/paycheck-info/> for details

**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](mailto:benefits@uw.edu)
- Retirees must officially retire from the UW to obtain all rights and benefits. Contact the UWHR Benefits Office at 206-543-4444 or [benefits@uw.edu](mailto: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

**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.
- Upload the employee's resignation notice to Workday in the Termination Business Process or through Maintain Worker Documents.

**Process termination in Workday:**

- **Voluntary:** [https://employeehelp.workday.uw.edu/user-guides/term\\_vol\\_sc/](https://employeehelp.workday.uw.edu/user-guides/term_vol_sc/)
- **Involuntary:** [https://employeehelp.workday.uw.edu/user-guides/term\\_invol\\_sc/](https://employeehelp.workday.uw.edu/user-guides/term_invol_sc/)

**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.

**Forwarding address:**

- If employee has not updated their personal contact information in Workday, their HR Partner may do so.

**Email:**

- Discuss whether the 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](mailto:help@uw.edu).
- Alternately, manager can email [aareq@uw.edu](mailto: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.

**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](mailto:help@uw.edu) to have the password reset.

**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.

**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/>

**Cancel Procurement Card, Reconciler Account Access, UW Travel Card:**

- Email ProCard cancellation requests to [procard@uw.edu](mailto: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 cancellation requests to [uwcts@uw.edu](mailto:uwcts@uw.edu) including the cardholder's name and the last 4 digits of the account number. For additional information, email [uwcts@uw.edu](mailto:uwcts@uw.edu) or call 206.543.7171.

**Review and close department personnel file:**

- Retain documents as instructed in UW Records Retention Schedule: <https://finance.uw.edu/recmgt/gs>