

# Checklist for Classified and Professional Staff Separating from UW Employment

(Employees and managers of the academic medical centers – please contact your Human Resource department for new employee guidelines.)

Note: Employees should review the following list with their supervisors to determine which items are applicable.

## Employee responsibilities

- Submit letter of resignation, including your separation date. Talk to your supervisor about whether you will be using vacation time prior to your separation date.
- Review information about insurance continuation. If you are being laid off see: <http://www.washington.edu/admin/hr/benefits/insure/fac-staff-lib/leave/index.html>, otherwise see: <http://www.washington.edu/admin/hr/benefits/insure/fac-staff-lib/cobra/index.html>.
- If you wish to access retirement plan contributions, contact the Benefits Office at (206) 543-2800 or [benefits@u.washington.edu](mailto:benefits@u.washington.edu).
- Retirees must officially retire from the UW in order to obtain all rights and benefits, and should contact the UW Benefits Office at (206) 543-2800 or [benefits@u.washington.edu](mailto:benefits@u.washington.edu) for more information.
- Turn in all building/departmental keys (building, office, file cabinets).
- Return any UW equipment which may be in your possession.
- Turn in other UW materials - including, but not limited to:
  - Husky card - With U-PASS, turn in Husky card and U-PASS to Parking. (Employees at HMC should follow HMC procedures.) Without U-PASS, turn in Husky card to department.
  - Departmental Staff ID card
  - Parking Permit – Return to Parking Office
  - ProCard
  - SecurID
  - Travel VISA card
  - Sprint card
  - Pager
  - Cell phone
  - Laptop
- Provide supervisor with passwords to computer departmental files.
- Provide supervisor with voice mail access code.
- Update address in Employee Self Service through MyUW for final check and W-2 form. Update your voice mail message to advise callers of your separation and a number to call for assistance.
- Separating employees should either set up an auto-reply email message to let others know you have separated 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>.
- Ensure that your leave records are up to date and that you retain a record of your final leave balances.
- Contact the Payroll Office at [payroll@u.washington.edu](mailto:payroll@u.washington.edu) to discontinue payroll deductions.
- If you are the parent of a child enrolled in one of the University's on-site childcare centers, you must notify the center that you are separating from UW employment.

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Employee Name \_\_\_\_\_ EID Number \_\_\_\_\_  
 Termination Date \_\_\_\_\_ Mailing Address \_\_\_\_\_  
 Phone Number \_\_\_\_\_  
 Email Address \_\_\_\_\_

### Supervisor/Departmental responsibilities

#### Leave Records

- Receive letter of resignation or notification of appointment end date. Confirm that the employee is separating from the University and not transferring to a different UW department.
- OWLS Users - Update leave records in preparation of employee's separation, have the leave record audited and end the record. See the OWLS web pages on:  
 Auditing a record:  
<http://www.washington.edu/admin/hr/polproc/leave/owls/user-guide/timekeeper/spec-features/audit/index.html>  
 Ending a record:  
<http://www.washington.edu/admin/hr/polproc/leave/owls/user-guide/timekeeper/create-endrec/end-record/index.html>
- Form 220 users - If necessary, obtain signed time sheets. If the employee is unavailable to sign, write, "employee is unavailable for signature" on the employee's signature line (the 220 should not be sent to the employee for signature). Have the records audited.
- Process the Online Payroll Update System (OPUS) action to separate the employee.
- Complete the Employee Separation Payment Authorization form (UoW 1349).
- Send all audited 220 forms, a copy of the OWLS end record printout, a copy of the separation payment authorization form, a copy of the resignation letter, and a copy of the separation screen from OPUS to the HR Operations office that serves your department.

**Forwarding Address:** If employee has not updated their forwarding address on Employee Self Service, update their forwarding address information on OPUS.

**Building Access:** Receive all keys (office, building, desk, and file cabinets) and building use permits. Remove employee from electronic building access locking system database (Proxy card)

**Equipment:** Collect UW issued-equipment such as laptops, cell phones, software, or other tools

**Email:** Discuss how the separating employee's email will be handled

- There are two options, both of which require the employee to take action from their account. The separating employee can either set up an auto-reply email message to let others know they have separated or forward their 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>
- For other questions, please email [help@cac.washington.edu](mailto:help@cac.washington.edu) or call 543-5970.

**Electronic and Paper Files:** Determine location of computer and paper files; if necessary, move office files to shared drives. Obtain departmental computer passwords and computer access codes.

**Computer Access:** Remove/delete access to network directories and electronic calendar. For the Nebula network, email [nebula-support@cac.washington.edu](mailto:nebula-support@cac.washington.edu).

**Communications Access:** Remove access to communications – see

<http://www.washington.edu/admin/comtech/> for items listed below

- Cancel/change access to UWATS account
- Transfer or cancel voice mail, obtain voice mail password \_\_\_\_\_
- Return and cancel pagers
- Return cell phones
- Return Sprint cards

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### **Systems Access:** Remove access to Payroll and OPUS review functions

- Send an email to [opushelp@u.washington.edu](mailto:opushelp@u.washington.edu) to delete the employee as a reviewer for your Payroll Unit Code. This email should include the individual's name, UW NetID, and PUC. Consider updating PERM distribution list.
- To cancel access to OPUS, the PTR online system, and to remove individuals from the pronline mailing list, email [pronline@u.washington.edu](mailto:pronline@u.washington.edu).
- To remove individuals from the Payroll mailing list and the Payroll Coordinator list, email [payroll@u.washington.edu](mailto:payroll@u.washington.edu).
- Cancel SecurID and access to Keynes
  - To remove access for an individual, email [adminapp@u.washington.edu](mailto:adminapp@u.washington.edu). Include the person's name, user code, the reason why access should be deleted, and the serial number of their SecurID card (if known).  
All employees must return the SecurID card to the administrative systems service center, Box 352830. See <http://www.washington.edu/admin/adminsistemas/INTRO/>

### **Husky Card/Staff ID Card:**

- If the employee is separating and has a U-PASS, they must present their card to Parking for sticker removal. The employee then returns the Husky Card to the supervisor for destruction.

### **Cancel ProCurement Card or Reconciler Account Access**

- Department Administrators should email [procard@u.washington.edu](mailto:procard@u.washington.edu) or send a memo to the ProCurement Card Program in Financial Services requesting the following:
  - Cancel cardholder's ProCurement Card
  - Cancel web access for cardholder and/or reconciler
  - Remove reconciler email addresses associated with department cardholder accounts
  - Submit cardholder names that were the responsibility of the previous reconciler
  - Designate new reconciler and provide their UW NetID name
  - Submit new reconciler email address to replace the previous one
- Administrators must destroy and dispose of the ProCurement Card for employees who are separating.
- The same procedures apply for employees transferring to another department. In some instances accounting defaults can be changed to the new department so the employee can use the ProCurement Card in their new department. The Administrator of the new department should submit a new application for the transferring employee.
- For additional questions, call the ProCurement Card hotline at 543-5252.

### **Collect Travel VISA card**

- Email [trvlcard@u.washington.edu](mailto:trvlcard@u.washington.edu) with the name and the last 4 digits of the account number. Cut the card after cancellation and send it to the Travel Office Box 351117.
- For more information, call 543-5867 or 543-0658.
- Because cards are issued to individuals and not departments, there is no need to cancel the individual's travel card if they are transferring to a different department.
- For more information, call 543-5867 or 543-0658.

### **Remove access to Petty Cash funds**

- If the employee is a petty cash custodian notify Payables Administration at [apcsvc@u.washington.edu](mailto:apcsvc@u.washington.edu) or 206-543-4500.
- If the employee is an authorized signer contact the bank to update the signature card.

### **Discontinue records retrieval authorization (UW Records Management Office)**

- Send an email to [urc@u.washington.edu](mailto:urc@u.washington.edu)

### **Remove OASIS access (Equipment Inventory System)**

- Email [eio@u.washington.edu](mailto:eio@u.washington.edu) and include the employee's name, UW NetID, and org codes.
- For additional questions, see <http://www-oasis.cac.washington.edu/admin/adminsistemas/oasis>

### **Remove UW Development Advance access**

- Send an email to [devhelp@u.washington.edu](mailto:devhelp@u.washington.edu) to remove an employee's access to Advance. In the email, include the employee's name and the date they are separating or transferring to another department.
- For additional questions, call the Development Help Desk at 206-221-3947.

## Checklist for Classified and Professional Staff Separating from UW Employment

**Review, purge and close department personnel file.** Retain as instructed in UW Records Retention Schedule. See <http://www.washington.edu/admin/recmgt/uw.gs8.html>

If a manager or an administrator is separating from the University, provide employee separation information to HR Admin for use in updating and preparing the HR email lists. Email [uwhr@u.washington.edu](mailto:uwhr@u.washington.edu) with the employee's name, separation date, job title, and unit.

**Note: If you find that any of this information is outdated, please contact [uwhr@u.washington.edu](mailto:uwhr@u.washington.edu).**