**Date:**

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

**TERMATION 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 UWMC and UW System: (Complete Section 1)**

[ ]  **LAYOFF from UWMC and UW System: (Complete Section 1)**

[ ]  **TRANSFERRING within UWMC 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 to keep in your employee department file by . Thank you for your service with University of Washington 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:**

[ ]  **UWMC:**

[ ]  **UW:**

[ ]  **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

[ ]  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 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 or folders to a centrally-shared drives or folders

[ ]  Contact the following departments:

[ ]  **Parking**: You are responsible for notifying the [Transportation Services](http://www.washington.edu/facilities/transportation/commuterservices/contact) when you leave the UW. Please visit their office to cancel deductions and return parking permits or email ucommute@uw.edu . Failure to do so could result in continuing parking fees after your separation. **NOTE:** If transferring within the UWMC system, you do not need to take any action regarding 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 and destroying the card(s).

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

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Item Name | Item Information, ex. ID number | Return Date | Supervisor to Return to: | N/A |
| UWMC Photo ID/Name Badge, Keys, Key/Proxy Cards |       |       | Public Safety/Parking Office, BB120, BOX 356066 |       |
| Parking Permits/UPASS/Other UW-Transit options |       |       | Email ucommute@uw.edu to cancel |       |
| Locker Lock |       |       | Dept. manager or designate |       |
| Mobile Phone, Pager or other Telecom products, International/Premium Long Distance code |       |       | Teleservices, NE-165, BOX 356034 |       |
| Laptop computer |       |       | Dept. manager or designate |       |
| Travel VISA Card | Last 4 digits:       |       | Email cancelation to procard@u.washington.edu then destroy card |       |
| ProCard | Last 4 digits:       |       | Email cancelation to procard@u.washington.edu, then destroy card |       |
| Drives (Jump, Pen, Flash, etc.) |       |       | Dept. manager or designate |       |
| DUO token |       |       | ISC, Box 359555 |       |
| Other:       |       |       |       |       |
|       |       |       |       |       |

[ ]  Reimburse UWMC for any hotel deposits and/or prepaid conference registrations in which you did not attend.

[ ]  Submit final timesheet to supervisor.

[ ]  Turn in this Employee Separation Checklist to  on

**Section 2: Transferring from UWMC to another UWMC 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 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 badge with new job title and department name.

[ ]  If transferring from UWMC to HMC department, visit the HMC Badging Office (8CT-70) to update badge with 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)**

**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 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 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 UWMC Human Resources at hruwmc@uw.edu and UW Medicine Payroll Services at 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 UWMC/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. For more information call 206.543.1002

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

[ ]  Remove access to PMM/HEMM by emailing pmmhelp@uw.edu

[ ]  Remove access to records retrieval by emailing UW Medicine Records Management at 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 UWMC Management Council list (mgmtcn@uw.edu) by contacting Teresa Kennedy, teresake@uw.edu .

[ ]  Cancel international/premium long-distance code by contacting UWMC Teleservices, BOX 356034 or teleserv@uw.edu

[ ]  Cancel ProCard or Travel Card by emailing UW Procurement Office at 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.

[ ]  If employee is transferring within UWMC or HMC, please audit and forward the employee’s department file to the new department. If you do not know where to send the file, forward to Human Resources at BOX 359421, attention: File Coordinator and note that it’s a transfer. Human Resources will forward to the correct department.

[ ]  If employee is separating from UWMC, audit employee’s department file and forward to Human Resources at BOX 359421, attention: File Coordinator. Human Resources will archive the file at UW Medicine Records Management Services.

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