Classified and Professional Staff Employment Separation Checklist
FOR SUPERVISORS/MANAGERS

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 or WA State agency.
- Notify HR Partner via email and send a copy of resignation letter as soon as possible.
- Approve any leave requests still pending in Workday.
- Audit leave record to ensure all absences have been recorded to date.
- Discuss whether the employee will take any leave prior to their separation.

Forwarding Address:

- Remind employee to update their contact information in Workday prior to their departure. This is very important for tax purposes.
- If employee has not updated their address, their HR partner may do so after they have left, if provided with forwarding address.

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 (2) options, both would be beneficial:
- Set up an auto-reply email message to let others know they have separated and are forwarding their account to another employee.
- Set up an email forward to yours. Visit https://uwnetid.washington.edu/manage/?forward to set up mail forwarding.

For assistance with email forwarding, contact UW-IT at help@uw.edu.

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.
- Ensure that all electronic files are reviewed for retention in accordance with the department's records retention schedule.
- <mark>**DO NOT LEAVE ANY EMPLOYEE FILES ON GOOGLE DRIVE**</mark>. The employee should move files into their OneDrive folder where they can be retrieved if necessary. Any documents left in Google Drive will no longer be accessible.

Computer Access: Remove/delete access to network directories and electronic calendar.

Communications Access: Remove access to communications.

- Transfer or cancel voice mail, obtain voice mail password _____
- 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.
- Update security roles for Time & Absence approvers.
- 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 cancelation requests to 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 cancelation requests to procard@uw.edu including the cardholder's name and the last 4 digits of the account number. For additional information, email procard@uw.edu or call 206.543.5252.