

# UW TACOMA STAFF OFF-BOARDING CHECKLIST - SEPARATION

**REQUIRED** for any separating UWT contract-classified, classified non-union, or professional staff, or hourly/temporary staff losing ACTIVE APPOINTMENT STATUS for longer than 2 PAYPERIODS.\*

Employee Name: \_\_\_\_\_ EID: \_\_\_\_\_ Date of Separation: \_\_\_\_\_

## EMPLOYEE ACTION

DONE N/A

- Submit letter of resignation to department. (Include statement if transferring to another WA state agency.)
- Transfer departmental shared NetIDs, Catalyst surveys, etc. to supervisor or designee.
- Review information for records management off boarding: <https://finance.uw.edu/recmgt/Offboarding>
- Schedule Exit Interview with UWT HR ([uwthr@uw.edu](mailto:uwthr@uw.edu)) or complete Exit Survey: <https://forms.office.com/r/uwiHRf7aD5>
- Review information about COBRA on the UW Benefits Web site: <https://isc.uw.edu/your-benefits/ending/>

### On the last working day:

- Provide supervisor with passwords to any departmental files and voice mail.
- Update voice mail message to notify callers of your separation and a number to call for assistance.
- Set up an auto-reply email message to let others know of your separation and whom they should contact for assistance or forward account to another employee. (Ensure that UW email is not automatically forwarded to a private email address.)
- Go to <http://mailman1.u.washington.edu/mailman/listinfo/uwline> to unsubscribe to uwline.
- Verify accuracy of leave record in [Workday](#); sure all leave requests have been entered and approved.
- Turn in keys, pro-card and all other department-issued items.
- Turn Staff ID card into HR (Box 358431).
- Update mailing address [Workday](#) for final check and W-2 form. [Note: If moving to a state with income tax, wait to update your mailing address until after your last paycheck.]
- Turn in U-Pass and/or Parking Permit to Finance (Box 358431). The remaining balance will be deducted from the last paycheck for passes/permits that are not turned in.

Employee Signature \_\_\_\_\_

Date of Completion \_\_\_\_\_

## DEPARTMENT ACTION

DONE N/A

- Send the employee's original letter of resignation to UWT HR (Box 358431). Confirm whether the employee is transferring to another WA state agency or UW department.
- Discuss whether the employee should set up an auto-reply email message

### On the last working day:

- Notify UWT IT of the employee's separation by sending an email to [tachelp@uw.edu](mailto:tachelp@uw.edu). (Include separating employee's UWNetID, first name, last name, and date of separation.)
- Complete review and reconciliation of employee's time and leave records in [Workday](#).
- Obtain employee's passwords for departmental files and voicemail.
- Send email to [tacweb@uw.edu](mailto:tacweb@uw.edu) requesting that the employee's UWNetID be deleted from the online directory.
- Collect keys and all other department-issued items:
  - Keys/Access cards – send to Campus Safety
  - Procards – send card to UWT Fiscal Support Services (Box 358431)
  - Travel Card – Email [mailto:procard@uw.edu](mailto:mailto:procard@uw.edu) to cancel the card and send card to Procard Office (Box 351120)
- Remove Website permissions (email [tachelp@uw.edu](mailto:tachelp@uw.edu))

- Review and request ASTRA authorization changes as needed.
- Remove access to other position or department-specific systems [Note: Access to Canvas will be removed upon separation.]
- Information Management
  - Transfer files to department share drive
  - Preserve documents in [UW OneDrive](#) and/or [UW Google Drive](#)
  - Remove records retrieval authorization (UW Records Management Office): email [urc@uw.edu](mailto:urc@uw.edu).

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**Department Signature**

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**Date of Completion**