

## Checklist for Classified and Professional Staff Leaving SFR (Separating or Transferring)

<b>Employee responsibilities</b>	To/with: Supervisor	To: UW Parking	To: Beverly Anderson	To: Debi Pitzl	To: Carrie Cone	To: Kathy Heuring
<input type="checkbox"/> Submit letter (or email) of resignation, including last day in SFR and whether separating or transferring within the UW.	X		xc (all employees)	xc if @Pack Forest	xc if @UWBG	xc if @ONRC
<input type="checkbox"/> Discuss any planned use of vacation time.	X					
<input type="checkbox"/> Discuss disposition of computer and paper files; provide passwords to computer files.	X					
<input type="checkbox"/> Discuss disposition of email account (see choices below).	X					
<input type="checkbox"/> Provide voice mail password.	X					
<input type="checkbox"/> Return any laptops or UW equipment which may be at your residence.	X (notify Marc Morrison for UW inventory update)					
<input type="checkbox"/> Turn in Husky card.		X (with U-PASS)	X (without U-PASS)			
<input type="checkbox"/> Turn in Parking Permit.		X				
<input type="checkbox"/> Turn in ProCard.			X			
<input type="checkbox"/> Turn in SecurID.			X			
<input type="checkbox"/> Turn in individual travel card.			X			
<input type="checkbox"/> Turn in phone calling card.			X			
<input type="checkbox"/> Turn in keys, pagers, cellphones.			X if campus employee	X if @ Pack Forest	X if @ UWBG	X if @ ONRC
<input type="checkbox"/> Submit final Work Leave Report.	X					

If leaving the UW, go to the Benefits website at <http://www.washington.edu/admin/hr/benefits> to download forms and review information to continue medical and/or dental via COBRA, as well as accessing retirement or VIP contributions; continuing life insurance, etc.

If you have a child enrolled in one of the UW's on-site childcare centers, notify the center that you are separating from UW employment.

Contact the UW Payroll Office at [payroll@u.washington.edu](mailto:payroll@u.washington.edu) to discontinue any special payroll deductions.

Update address in Employee Self Service (ESS) for final check and W-2 form; update campus information if transferring within UW.

Update voice mail message to advise callers of your separation and a number to call for assistance

Email account: separating employees either 1) set up an auto-reply email separation message (see <http://www.washington.edu/computing/faqs/html/email.autoreply>), or 2) forward account to another employee (see <https://uwnetid.washington.edu/manage/?forward>).

**Note: To add/delete/correct any of this information, please contact [bj@u.washington.edu](mailto:bj@u.washington.edu).**

## Checklist for Classified and Professional Staff Leaving SFR (Separating or Transferring)

<b>Department responsibilities</b>	Supervisor	Beverly Anderson	Pat Saunders	Carrie Cone	Kathy Heuring	SFRPAY Beverly Anderson	SFRIT Dir Marc Morrison	CMU Dir Cecilia Paul
<input type="checkbox"/> Notify SFR Payroll, SFRIT, and Dtr of Communications		X						
<input type="checkbox"/> Review, sign, and submit final Work Leave Report	X							
<input type="checkbox"/> Enter final Work Leave Report into OWLS; review & reconcile Work Leave record				UWBG		All except UWBG		
<input type="checkbox"/> Process OPUS action to separate employee or change Home Dept				UWBG		All except UWBG		
<input type="checkbox"/> If 'ee separating, complete Employee Separation Payment Authorization; obtain signatures and attachments, if needed, and distribute copies				UWBG		All except UWBG		
<input type="checkbox"/> Collect keys and return to inventory		For campus	For Pack Forest	For UWBG	For ONRC			
<input type="checkbox"/> Cancel UWATS account		X						
<input type="checkbox"/> Cancel calling cards		X						
<input type="checkbox"/> Cancel and return pagers		For campus	For Pack Forest	For UWBG	For ONRC			
<input type="checkbox"/> Return cell phones		For campus	For Pack Forest	For UWBG	For ONRC			
<input type="checkbox"/> Remove OPUS access		X						
<input type="checkbox"/> Cancel SecurID and return to C&CI; remove access to Keynes		X						
<input type="checkbox"/> Remove Financial Desktop access		X						
<input type="checkbox"/> Destroy Husky Card (without U-Pass)		X						
<input type="checkbox"/> Remove OASIS access		X						
<input type="checkbox"/> Cancel ProCard and/or Reconciler Access, updating reconciler links as needed; destroy ProCard		X						
<input type="checkbox"/> Cancel individual travel card		X						
<input type="checkbox"/> Cancel CTA access		X						
<input type="checkbox"/> Remove Petty Cash custodian duties; if authorized signer update bank signature card		X						
<input type="checkbox"/> Remove Development Advance access		X						
<input type="checkbox"/> Check OASIS for equipment to redeploy to others; update OASIS							X	
<input type="checkbox"/> Remove access to network, lists, etc.							X	
<input type="checkbox"/> Update directory								X
<input type="checkbox"/> Review and close dept personnel file; retain in inactive files for 3 years		X						

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