



## Employee Offboarding Checklist

**NOTE** - *Before completing any other steps on this checklist, you must submit your resignation to your supervisor. Your resignation should include your final working date, indicate whether you are transferring within Washington State service or the University of Washington, and state if you are formally retiring. Providing at least two weeks' notice is considered best practice.*

### Partner with the Executive Office Shared Environment on the following items:

- Schedule an exit interview with Terry Wilson, Executive Office Associate Director of Employee Relations, if you would like one (not required) by emailing [tnwilson@uw.edu](mailto:tnwilson@uw.edu).
- If you have a ProCard:
  - Work with Executive Office Finance (EOFin) to ensure final audits of ProCard are submitted accurately via the [EOFin Document Upload form](#).
  - Submit an [EOFin General Consult form](#) to partner on ensuring your ProCard is cancelled.
- If you have any remaining UW business related travel expenses that have not yet been reimbursed, submit an [EOFin travel reimbursement request form](#) to EOFFin prior to your last day.

### Partner with your supervisor on the following items:

**NOTE** - *Certain supervisors may delegate employees offboarding tasks. Please discuss with your supervisor to determine if you will be working directly with them or a delegated individual.*

- Ensure all vacation and time-off requests are approved to allow for payout.
- Coordinate with your supervisor on setting up an email autoreply and voicemail message to inform others of your departure and provide updated contact information.
- Return any equipment, keys, and ID badges (not your Husky Card).
- Review the [Records Management Offboarding Resource](#) and complete the [Records Management Offboarding Checklist](#) and provide the completed version to your supervisor to ensure proper storage and hand over of documents, including email, electronic records, and paper records.

### Manage the following items on your own:

- If you are an hourly or non-exempt employee, ensure that you've submitted your final timesheet of hours worked into Workday prior to the end of your final day of work.
- Cancel all personal payroll deductions (e.g., parking).
- If you have a UW Travel Card, cancel it by emailing [uwcts@uw.edu](mailto:uwcts@uw.edu) with your name and the last four digits of your account number.
- If your child is enrolled in UW on-site childcare, notify the center of your separation from UW employment.
- Remove any UW-licensed software from personal devices.

## Executive Office Shared Environment



- Review [insurance continuation options](#). If you have questions, contact UWHR Benefits at 206-543-4444 or [benefits@uw.edu](mailto:benefits@uw.edu).
- To access retirement plan contributions, contact UWHR Benefits at 206-543-4444 or [benefits@uw.edu](mailto:benefits@uw.edu).
- Past tax documents will remain accessible to you in Workday. Upcoming tax documents will populate there as well using your listed contact information, ensure its accuracy.

### Important note for retirees:

You must officially retire from the UW to access retiree rights and benefits. Contact the UWHR Benefits Office at 206-543-4444 or [benefits@uw.edu](mailto:benefits@uw.edu). This process can take a few weeks, so it is recommended that you begin this process as soon as possible.