Off Boarding Checklist for Supervisors

**Important:**
Advise employee on the importance of meeting with our Payroll/Benefits Specialist as soon as possible to learn about the impact of this change on their payroll and benefits.

**Documentation Procedures:**
- Complete ePAF and attach resignation letter

**Return of UW System Administration Property:**
- **Parking Permit**
  - Employee returns to Bill Utzig, 780 Regent Street (for parking at 780 Regent and 660 W. Washington) or to UW Madison Parking (for parking on UW Madison campus).
- **Building Access (keys and key fobs)**
  - Supervisor returns to Joyce Jackson, 1752 Van Hise Hall, 263-5512; or Bill Utzig, 780 Regent Street, 260-0394; or Amy Bayer, 660 W. Washington Ave., 262-6217.
- **Multifactor Authentication Fob or Application**
  - Employee returns to C.I.T.S at 780 Regent Street or Amy Bayer at 660 W. Washington Ave., or emails one of them to deactivate Phone App.
- **Electronic UWSA property (e.g. lap top, cell phone, etc.)**
  - Employee returns to supervisor or leaves at desk.
  - Advise employee to un-install all UW System licensed software on their home PC.
- **UW Purchasing Card**
  - Employee returns to Supervisor. Cut card in two and return to the UWSA Purchasing Card Administrator in Financial Administration. Questions may be directed to Accounts Payable at 263-6973.
- **Sales & Use Tax Exemption Certificate**
  - Employee returns to Supervisor.

**Electronic Files/Email/Voicemail Procedures:**
- **Electronic files** - advise employee to move files to an accessible location
  - Anything that is not their personal file is public record and should be accessible.
- **E-mail** - inform employee how you want them to manage their email files as well as incoming emails after they have left (any questions contact the Helpdesk).
  - Grant another employee access to the e-mail.
  - Establish automatic forwarding to another employee.
  - Establish an automatic reply with a notification of who should be contacted instead of the former employee.

**Miscellaneous:**
- Inform employee of the option to contact UW System Human Resources to participate in an exit interview or complete an exit survey.