



Off Boarding Checklist for Supervisors

Important:

Advise the employee about the importance of reviewing what happens to their benefits and leave. Information can be found on the UW System Employee Benefits website > Life Events web pages:

- [Termination](#)
- [Retirement](#)

If the employee has additional questions after reviewing the available resources they may contact a benefits counselor at benefits@uwss.wisconsin.edu or (888) 298-0141.

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 Brenda Joyce, 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 the UWSA Help Desk

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.

Change voicemail access and/or message.

Follow up with employee to make sure this has been accomplished before leaving.

Miscellaneous:

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