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**CALS Supervisor Checklist**

**for Offboarding Employees**

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| **Employee Information** | |
| Employee Name: | Title: |
| Last Day Worked: | Effective Date: |

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| **Prior to employee’s last day** |

Inform department administrator of employee resignation

Connect with department administrator regarding vacancy to determine next steps

Communicate with employee regarding removal of system access: <https://kb.wisc.edu/79984>

Communicate with employee regarding informing other necessary parties of departure

For example: co-workers, work teams/committees, customers, etc.

If applicable, communicate with employee regarding coursework and training reimbursement: <https://www.ohr.wisc.edu/docs/EmployeeCourseworkTrainingProcedures.pdf>

Instruct employee to complete [knowledge transfer template](https://uwmadison.box.com/shared/static/bkbdzof2opsujha33x1ju4sczm4f0tv7.docx), if applicable

Review completed knowledge transfer template and take action regarding task reassignment and/or temporary delegation to interim person

Be prepared to connect employee with department HR regarding benefits coverage, leave payouts, and, if applicable, retirement information

* + Benefits: <https://www.wisconsin.edu/ohrwd/benefits/life-events/empcha/>
  + Leave payouts: <https://www.ohr.wisc.edu/benefits/docs/paid-leave-payout-at-termination.pdf>
  + Retirement: <https://hr.wisc.edu/retirement/>

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| **Employee’s last day** |

Ensure ownership is transferred for collaborative platforms (i.e. Google docs, Box, SharePoint, etc.)

See more information here: <https://kb.wisc.edu/page.php?id=80854#checklist>

Ensure university business files and collaborative docs are moved from personal to shared location

Communicate with department administrator regarding updating department contact lists/directories (website, intranet, WiscLists, paper, bulletin boards, etc.)

Ensure employee:

Cleaned work area and removed personal belongings

Submitted remaining [time and/or absences](https://uwservice.wisconsin.edu/help/time-absence/#for-employees)

Returned all University property (i.e. laptop, keys, uniform, vehicles, cell phone, tools, etc.)

Set appropriate outgoing voicemail message

Set appropriate outgoing email automatic reply

Returned purchasing card, if applicable

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| **After employee’s last day** |

[Approve all outstanding time and/or absences](https://uwservice.wisconsin.edu/help/time-absence/#for-managers)

Merge and purge employee file (i.e. merge to eFile and clean up personal notes)