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**CALS Department Admin Checklist**

**for Offboarding Employees**

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

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| **Prior to last day** |

[ ]  Inform HR of termination including last day worked and effective date and send copy of employee resignation letter (if applicable)

[ ]  Draft and send resignation acknowledgement letter (template available on [CALS HR website](https://hr.cals.wisc.edu/administrative-resources/position-management/retirement/))

[ ]  Submit JEMS job change to indicate termination (not applicable if departing employee is transferring within UW)

[ ]  Enter termination date in Compli-9 (not applicable if departing employee is transferring within UW)

[ ]  Connect with employee supervisor regarding vacancy to determine next steps

[ ]  Optional - conduct exit interview and send to [assigned HR Manager](https://hr.cals.wisc.edu/hr-directory-by-department/)

[ ]  Complete retirement-specific actions, if applicable

[ ]  Request [retirement certificate](https://hr.wisc.edu/request-for-retirement-certificate/)

[ ]  Assist employee with Emeritus status application (information available on [CALS HR website](https://hr.cals.wisc.edu/recruiting-appointment-info/other-types-of-appointments/emeritus/))

[ ] Ensure employee has submitted remaining time and/or absences

[ ] Be prepared to speak with employee regarding benefits coverage, leave payouts, IT systems 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>
	+ IT: <https://kb.wisc.edu/page.php?id=78565>
	+ Retirement: <https://hr.wisc.edu/retirement/>

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| **Last day** |

[ ]  Work with supervisor and your local IT to ensure employee:

[ ]  Cleaned work area and removed personal belongings

[ ]  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 last day** |

[ ]  Update department contact lists/directories (org charts, website, intranet, WiscLists, paper, bulletin boards, etc.)

[ ]  Remove employee mailbox

[ ]  Remove building access from employee Wiscard, if applicable
[ ]  Remove employee access from applicable systems

[ ]  Remove employee presets from printers, scanners, etc.

[ ]  Ensure employee personnel file is marked as inactive

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| **If employee is a supervisor:** |

[ ]  Update [TL Security](https://kb.wisc.edu/hrs/17043) in HRS to new or temporary approver

[ ]  Draft and send supervisor change letter for supervisor’s employee/s to CALS HR

[ ]  Route supervisor change letter/s for signatures

[ ]  Distribute signed letter/s to employees if desired