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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