

# Checklist for Separating Faculty and Academic Staff

## Use for Faculty separating from or changing to a non-faculty position within the University.

Note: The items listed below will vary depending on whether they are separating from the University or changing status from a faculty position to a staff position. Review the list with your supervisor to find out which items are applicable.

### Employee responsibilities

- Submit letter of resignation, including your separation date and name of new institution.
- Separating employees are advised to contact the Benefits website at <http://www.washington.edu/admin/hr/benefits> to download forms and review information and rates to continue medical and/or dental via COBRA, as well as accessing retirement or VIP contributions; continuing life insurance, etc.
- Retirees must officially retire from the UW in order to obtain all rights and benefits, and should contact the UW Benefits Office at (206) 543-2800 or [benefits@u.washington.edu](mailto:benefits@u.washington.edu) for more information.
- For information regarding joining the UW Retirement Association contact the Retirement Center at (206) 8600 or [retiremt@u.washington.edu](mailto:retiremt@u.washington.edu)
- Employees transferring directly within the UW to another benefits eligible position when there is a change in status (i.e., from faculty to professional staff) need to take action in regards to their benefits.
- Turn in all building/departmental keys (building, office, file cabinets)
- Return any UW equipment which may be at your residence
- Turn in other UW materials - including, but not limited to
  - Husky card - With U-PASS, turn in Husky card and U-PASS to Commuter Services. (Employees at HMC should follow HMC procedures.) Without U-PASS, turn in Husky card to department.
  - Departmental Employee ID card
  - Parking Permit – Return to Commuter Services
  - ProCard
  - Travel VISA card
  - Sprint card
  - Pager
  - Cell phone
  - Laptop
  - SecurID
- Provide department administrator with passwords to computer departmental files
- Provide department administrator with voice mail access code
- Update address in Employee Self Service through MyUW for final check and W-2 form. Transferring employees should update their directory information through ESS
- Update your voice mail message to advise callers of your separation and a number to call for assistance
- Separating employees should either set up an auto-reply email message to let others know you have separated or forward your account to another employee. For instructions on setting up auto-reply messages, see <http://www.washington.edu/computing/faqs/html/email.autoreply>. To forward your email account to another employee or supervisor, see <https://uwnetid.washington.edu/manage/?forward>
- Contact the Payroll Office at [payroll@u.washington.edu](mailto:payroll@u.washington.edu) to discontinue payroll deductions.
- If you are the parent of a child enrolled in one of the University's on-site childcare centers, you must notify the center that you are separating from UW employment.

# CHECKLIST FOR SEPARATING FACULTY

Use for Faculty either separating from or transferring to a non-faculty position within the University.

Employee Name \_\_\_\_\_ EID Number \_\_\_\_\_  
Termination Date \_\_\_\_\_ Mailing Address \_\_\_\_\_  
Phone Number \_\_\_\_\_  
Email Address \_\_\_\_\_

## Supervisor/Departmental responsibilities

### 1. Human Resources:

- Follow Faculty Separation and Retirement Policies on the Academic Human Resources website at: [http://www.washington.edu/admin/acadpers/admin/separation\\_retirement.html](http://www.washington.edu/admin/acadpers/admin/separation_retirement.html)
- Receive letter of resignation or notification of appointment end date. Send original or a copy of letter of resignation to Academic Human Resources, box 351270
- Process the Online Payroll Update System (OPUS) action to separate the employee. Include the name of the Faculty Member's new institution in the OPUS action NOTE.

### 2. Employee Self-Service:

- If employee has not updated their forwarding address on Employee Self-Service, update their forwarding address information in OPUS.

### 3. Keys:

- Receive all keys (office, building, desk, and file cabinets) and Building Use permits

### 4. Prox Card:

- Remove employee from electronic building access locking system database (Prox card)

### 5. Equipment:

- Collect UW issued equipment such as laptops, cell phones, software, or other tools

### 6. Email:

- There are two options, both of which require the employee to take action from their account. The separating employee can either set up an auto-reply email message to let others know they have separated or forward their account to another employee. For instructions on setting up auto-reply messages, see <http://www.washington.edu/computing/faqs/html/email.autoreply>. To forward your email account to another employee or supervisor, see <https://uwnetid.washington.edu/manage/?forward>

For other questions, please email [help@u.washington.edu](mailto:help@u.washington.edu) or call 543-5970.

7. **Files (electronic and paper):**

- Determine location of computer and paper files; if necessary, move office files to shared drives. Ask for departmental computer passwords and computer access codes.

8. **Electronic directories:**

- Remove/delete access to network directories and electronic calendar. For the Nebula network, email [nebula@u.washington.edu](mailto:nebula@u.washington.edu).

9. **Communications:** – see <http://www.washington.edu/admin/comtech/> for items listed below

- Cancel/change access to UWATS account
- Transfer or cancel voice mail, obtain voice mail password \_\_\_\_\_
- Return and cancel pagers
- Return cell phones
- Return Sprint cards

10. **Husky Card/Faculty ID Card:**

- If the employee is separating and has a U-PASS, they must present their card to Commuter Services for sticker removal. The employee then returns the Husky Card to the supervisor for destruction.

11. **ProCurement Card:**

- Department Administrators should email [djwright@u.washington.edu](mailto:djwright@u.washington.edu) or send a memo to the ProCurement Card Program in Financial Services requesting the following:
- cancel cardholder's ProCurement Card
- cancel web access for cardholder
- Administrators must destroy and dispose of the ProCurement Card for employees who are separating.
- If the employee is transferring to another department, the defaults can be changed so the employee can use the ProCurement Card in their new department. The Administrator of the new department should submit the new budget and object coding defaults and the new reconciler's UW NetID name for the cardholder.
- For additional questions, call the ProCurement Card hotline at 543-5252.

12. **Travel VISA card:**

- Remind employees to return their card to the Travel card administrator at Box 351117 on or before their last day of work and pay the remaining balance on their card.
- Because cards are issued to individuals and not departments, there is no need to cancel the individual's travel card if they are transferring to a different department.
- For more information, call 543-5867 or 543-0658.

13. **Personnel file:**

- Retain as instructed in UW Records Retention Schedule. See <http://www.washington.edu/admin/recmgt/uw.gs8.html>

14. **Online systems:**

- Remove access to online systems

**Note: If you find that any of this information is outdated, please contact [acadpers@u.washington.edu](mailto:acadpers@u.washington.edu).**