



# 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 Universities of Wisconsin 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 [serviceoperations@support.wisconsin.edu](mailto:serviceoperations@support.wisconsin.edu) or (888) 298-0141.

**Documentation Procedures:**

Complete the [Approval for Staff Changes](#) form, attach the resignation letter, and submit it to Human Resources. In the submission to Human Resources indicate if the employee works remote or hybrid.

**Return of the Universities of Wisconsin Administration's Property\*:****Parking Permit**

- Employee returns permit 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 (if applicable)**

- Employee returns with equipment to UWSA.

**Electronic UWSA property (e.g., laptop, cell phone, etc.)**

- Employee returns to supervisor or leaves at desk.
- Advise employee to un-install all the Universities of Wisconsin licensed software on their home PC.

**Other UWSA Issued property (e.g., chairs, microphones, lighting)**

- Employee returns to Supervisor. The supervisor will work with the building manager to return the property to inventory.

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## UW Purchasing Card

- Employee returns to Supervisor. The supervisor should cut the card in two and return it to the UWSA Purchasing Card Administrator in Financial Administration. Questions may be directed to Accounts Payable at 608-263-6973.

## Sales & Use Tax Exemption Certificate

- Employee returns to Supervisor.

*\*Employees working 100% remote will be contacted by IT to coordinate the return of all UWSA issued electronic equipment.*

## **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 completed before leaving.

## **Miscellaneous:**

- Remind the employee to complete timesheets and/or leave reports to ensure timely leave payouts.
- Inform employees of the option to contact the Universities of Wisconsin Office of Human Resources to participate in an exit interview or complete an exit survey.