

UW TACOMA STAFF OFF-BOARDING CHECKLIST – UW TRANSFER

WPRB-CLASSIFIED, CONTRACT-CLASSIFIED AND PROFESSIONAL STAFF

To ensure the smoothest transition between UW departments, please work with the employee and the new department to coordinate changes in access and permissions to different UW systems, budgets, etc.

EMPLOYEE ACTION

DONE N/A

- Submit letter of resignation to department.
- Provide supervisor with passwords to any departmental files and voice mail.
- Update voice mail message to notify callers of your transfer/departure and a number to call for assistance.
- Verify accuracy of leave record in [Workday](#).
- Turn in departmental keys.
- Transfer departmental shared NetIDs, Catalyst surveys, etc. to supervisor or designee.
- Review information for records management off boarding: <https://finance.uw.edu/recmgt/Offboarding>

If transferring to UW Seattle:

- Schedule Exit Interview with UWT HR (optional)
- Turn in keys and access card to Campus Safety.
- Turn in U-Pass to HR/Payroll (Box 358431).

Employee Signature

Date of Completion

DEPARTMENT ACTION

DONE N/A

- Send the employee's original letter of resignation to the UWT HR Office (Box 358431).
- Complete review and reconciliation of employee's leave record in [Workday](#).
- Notify UWT IT of the transfer by emailing tachelp@uw.edu.
- Obtain employee's passwords for departmental files and voicemail.
- Remove employee from Faculty/Staff Directory.
- Collect keys and other department-specific items
- Coordinate changes in access or budget to be charged:
 - Entrust Token, ASTRA access, MyFinancial Desktop (contact UWT Fiscal Services)
 - Pro-card (contact UWT Fiscal Services)
 - Travel Card (contact UWT Fiscal Services)
 - Website permissions (email tachelp@uw.edu)
 - Records retrieval authorization (UW Records Management Office): email urc@u.washington.edu.
 - Other: _____

Department Signature

Date of Completion

Send completed form to UWT HR, Box 358431