**Employee Separation Log**

*This is a guidance and reference document and therefore may not be specific to your school/college/division. Check your school/college/division offboarding process to ensure all tasks are complete before the employee’s last day of employment.*

Employee Name: Click or tap here to enter text. EMPLID: Click or tap here to enter text. EMPL Record: # Supervisor/Contact: Click or tap here to enter text.Employing Unit: Click or tap here to enter text.

Termination Date: Click or tap here to enter text. Last Day in Office (if different): Click or tap here to enter text.

Employment Classification:  Academic  Limited  University  Temporary Employee  Faculty

Type:  Termination  Transfer to other Unit/Institution  Retirement

**HR**

*Select One - Is employee:*

Transferring to State Agency/Different UW System Campus

-If transferring to State Service/Different UW System Campus:

Did the employee choose to have payout of leave balances?

Will new employing agency accept leave balance payout?

Coordinate with other UW Institutions to transfer Personnel File

Transferring to a different department in UW Madison

-Check with new unit on Transfer entry and skip to payroll notification.

Leaving State Service?

-If leaving State Service, will employee take payout or use leave time to remain on Payroll?

-HR will work with Payroll to determine leave projection and adjust HRS termination date accordingly.

Unknown where employee will be employed next:

If WPM or Extension, follow up with WPM/Extension HR to confirm plans after separating from current division

All other units: Follow up with employee directly to confirm plans after separating from current division

**\*Notes: \***

-**If an employee transfers to a different department within the same campus, the new department must accept all leave balances (sick, vacation, etc.)**

-**If an employee transfers to a different campus or to a State Agency, the new employer must accept the sick leave only. It is at the discretion of the employer to accept or decline all other**

Check HRS to see if employee is on Furlough, Temporary Work Reduction, Leave of Absence or any other Salary Reduction? (Check Job Data History)

If yes, enter a new row to end the Furlough/Work Reduction/LOA/other Salary Reduction first before entering the termination row

Check HRS to see if the employee has more than one active appointment?

If yes, and the additional appointment is a backup appointment, ensure if the backup appointment should end the same date as the main appointment

If yes, review to find out if both appointments are ending

Review appointment letter to see if the employee had a hiring bonus?

If yes, determine if the employee worked at least 12 months in the role

If no, inform payroll on the termination notice of the hiring bonus and length of employment

Enter Termination Row in HRS

Email the employee to invite them to participate in the Exit Interview survey.

-All Divisions Except WPM and Ext

Contact EE to ask for supervisory replacement if in management role.

-Or check OBIEE/Tableau report

Contact Supervisor to remind them of departmental off-boarding tasks including transferring access of files, box folders, and email/phone message forwarding.

Parking  Emails-Send reminder about out of office response and forwarding rules

Send email to Payroll and Benefits

**Payroll**

Enter EE information on terminating spreadsheet

Timesheet hours are entered up to term date (US)

Leave report is submitted up to term date (FAASLI)

•Leave payout will not be processed if EE has any missing leave reports.

TL security update (see Supervisor-Department Change Log)

Google Groups Update

Wisclist Removal (OHR: Donna)

Enter term date in I-9 System (If EE has no other active appointments in HRS)

Leave payout entries (ALRA, PH, VN, VNC, Comp Time, and Floating Holiday (LH))

• Enter ALRA Funding String for Payout

• 136 980100 1 AAB1193

Hiring Bonus recovery Negative payline submitted (if applicable)

Retirement Certificate (20 years of services; govt certificate)

**Separation Email Notification HR To Payroll Template**

*This template may be used by divisional human resources to inform their divisional payroll of an employee’s resignation/retirement.*

***Name’s*** resignation/retirement has been processed.

Employee:

Employee ID:

Employee Record:

Employee Class:

Department ID:

HRS Term Effective Date:

Last day working in office:

Last Day on Payroll:

* Action Termination – Reason: (Retirement, Resignation, Transfer etc.)
* Transferring to a State Agency/Different UW System Campus
* Transferring to a different Department in UW‐Madison
* Leaving State Service
* Payouts Needed (Choose One):
* Payroll please process full payout
* Transfer leave to other active employee record
* Leave to transfer via PTR
* Leave being used to extend appointment end date
* Employee is planning disability retirement - Do not pay out leave
* Hiring Bonus information:
* No hiring bonus paid - no action needed
* If hiring bonus paid, has the employee worked at least 12 months in the job for the hiring bonus?
* Yes: No action needed
* No: How long did the employee work?
  + Length:
* Direct Reports moved to:
* Direct Reports Names and Employee ID’s

Any other information?