**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?