



UW-La Crosse Human Resources Checklist & Inventory for:

Separating Employee Name: _____

Separating Employee ID#: _____

Separation Date: _____

Department: _____

Chair/Supervisor Name: _____

Employee (Non-Retirement): Employee Exit Checklist

The University of Wisconsin-La Crosse Office of Human Resources is committed to serving our campus stakeholders in a manner that prepares them for their future endeavors. This checklist and inventory are to help guide the conversations of Human Resource Partners with a separating employee who is retiring.

When HR learns of an employee's separation, within 24 hours, HR will contact the separating employee.

- Ensure employee has met with supervisor to discuss their exit and any outstanding tasks needed to be completed prior to separation.
- Use the initial conversation to conduct an informal exit interview.
- Make sure that the employee has contacted ETF and has no outstanding questions on benefits/continuation of coverage. (Connect with Benefits & Wellness Specialist if not).
- Ensure Benefits & Wellness Specialist is aware of retirement.
- Review the [Employee Separation Checklist](#) with the employee.
- Discuss post-employment at UWL (University Advancement contact; how to stay up to date, etc.)
- Discuss how employee can receive final pay advice and future W-2's
- Address follow-up questions

Human Resource Partner Follow-up:

- Follow-up 5 days prior to employee's separation
- Follow-up 1 day prior to employee's separation
- Follow-up 2 days *after* employee's separation



Additional notes:

HR Partner Sign Off: _____

Date: _____

**This document should be placed in the employee's electronic/p-file upon completion.*