



UW-La Crosse Human Resources Checklist & Inventory for:

Separating Employee Name: _____

Separating Employee ID#: _____

Separation Date: _____

Department: _____

Chair/Supervisor Name: _____

Employee (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 retirement. (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.)
- Review the ETF 75 day cooling off period required before re-engagement.
- Ask about what the employee believes are their most successful accomplishments (Discuss adding to our Kudos page and with the supervisor)
- Review emeritus eligibility and status.
- 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



<input type="checkbox"/>	Follow-up 1 day prior to employee's separation
<input type="checkbox"/>	Follow-up 2 days <i>after</i> employee's separation

Additional notes:

HR Partner Sign Off: _____

Date: _____

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