When an organization and an employee make the decision to part ways, it is important to make the transition as smooth as possible. This form is designed to assist you in making this a comprehensive and efficient process. Pages 1-4 are to be completed by departmental HR and/or the supervisor while page 5 is a resource page for the departing employee.

A departing employee is defined as one who is separating from the university and will not be transferring to another unit. Departments with an employee who is transferring to another unit should complete the [Exit Checklist: Transfer.](https://hr.ufl.edu/wp-content/uploads/2024/01/exit-checklist_transfer.docx)

**Note:** employees who have a position number (TEAMS, Faculty, USPS, etc.) and who may be transferring into a non-position numbered appointment (OPS, Courtesy Faculty, etc.) should use this checklist for separation as the tasks below are more comprehensive.

Completed by Departmental HR & Supervisor

Who is Leaving?

**Initiating the Process**

|  |
| --- |
| Name: |
| UFID: | Date of Hire: |
| Department: | Date of Termination: |

Reason for Separation

Provide reason for separation below (i.e., resignation, layoff, non-renewal, end of temporary assignment, etc.)

|  |
| --- |
|  |

Keeping in Touch After the Departure

Mailing information should be verified to ensure official UF documents and final payments are forwarded to the correct address. If the mailing address in myUFL is different, please update.

|  |
| --- |
| Mailing Address:  |
| Email Address: |
| Phone Number: |

Making Changes in myUFL

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Collect termination documentation (i.e., resignation letter/email, non-renewal letter, etc.) |[ ]
| Enter employee’s termination date with appropriate reason code in the myUFL system and include termination documentation |[ ]
| Process any non-reimbursed travel expenses through the department prior to termination date |[ ]

Sponsored Research Actions

**Prior to the Last Day of Employment**

If the departing employee had sponsored research responsibilities, please complete the following tasks.

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Notify Sponsored Research if the departing employee is a faculty member on a grant at <https://research.ufl.edu/forms/notification-of-departing-pi.html>  |[ ]
| Verify any outstanding reports pending for Sponsored Research are submitted  |[ ]
| Verify disclosures of inventions and copyrights are submitted |[ ]
| Ensure lab supplies/chemical/hazardous material/work in process are identified and inventoried |[ ]
| If lab space was used, lab space must be “closed out” through Environmental Health and Safety |[ ]

Notify Departing Employee

When an employee separation occurs, it is important to inform the departing employee of their rights and benefits.

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Provide employee the Employee Exit Survey link: [hr.ufl.edu/exit](https://hr.ufl.edu/exit/)  |[ ]
| Inform exiting employee about the Special Pay Plan: [benefits.hr.ufl.edu/retirement/special-pay-plan/](https://benefits.hr.ufl.edu/retirement/special-pay-plan/) |[ ]
| Recommend employee to contact the UFHR Benefits and Retirement Office at benefits@ufl.edu for any benefits and/or retirement related inquiries |[ ]
| Provide information on W-2 statement mailing process: <https://www.fa.ufl.edu/wp-content/uploads/2022/12/W2_Guidance_for_Former_Employees.pdf>  |[ ]
| Provide information on leave cash out and timeline to receive amount due, if applicable |[ ]
| Remind employee to cancel parking decal with <https://taps.ufl.edu/>  |[ ]
| Notify of eligibility changes to employment education programs, if applicable (EEP, HEO) |[ ]

Managing Logistics

**On the Last Day of Employment**

The departing employee’s email account is disabled automatically after termination unless the employee is a retiree, alumni, or current student. If the departing employee needs to keep the email address active, contact the identity coordinator in your department to provide them the appropriate affiliation to do so.

|  |  |
| --- | --- |
| Action | Completed if applicable |
|  Terminate or modify security access roles and affiliations to UF systems from departing department: myUFL, ERP systems, Network Managed by, departmental affiliation etc. |[ ]
|  Work with your local IT support team for these items. Terminate or modify security access to computer systems: GatorLink account, service account(s), network drives, distribution lists, shared mailboxes etc. |[ ]
|  Confirm departmental SharePoint site owner(s) have removed/updated ownership for all local SharePoint sites for the departing employee. |[ ]
|  Confirm departmental Teams site owner(s) have removed/updated ownership for all local Teams sites for the departing employee. |[ ]
|  Terminate access to building(s) through the appropriate security system |[ ]
|  Remove employee’s name from authorized signature list(s), vehicle authorization records |[ ]
|  Remove employee’s name from office phone list, website, building directory, office mailbox, recurring Outlook meetings, Outlook calendars |[ ]
|  Verify wireless reimbursement is stopped in myUFL |[ ]
|  Contact the PCard team to cancel PCard * Email pcard@ufl.edu and include the cardholder’s (employee’s) name, UFID, and the reason for cancellation

*Optional: Collect physical PCard from departing employee* |[ ]

Collecting Items from Departing Employee

**On the Last Day of Employment**

During an employee’s tenure, he/she might have acquired university property. Be sure to collect these items prior to his/her departure.

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Keys, PCard, and any other access cards |[ ]
| UF materials (uniforms, lab equipment, books, computers, clinical trials information, patient’s notes, etc.) |[ ]

Requesting Vacation and Special Pay Information Cash Out

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Verify travel advances, salary overpayments, cash advances and other debt owed including paid parental leave is repaid to UF * If, debt is owed, submit request for payment prior to completing leave cash out
 |[ ]
| Submit appropriate leave cash out ePAF submitted promptly after termination (within two weeks of the termination date) |[ ]

**Completed by**

|  |  |
| --- | --- |
| Name: | Title: |

Departing Employee Resources

As you transition from your employment at the University of Florida, we hope you find the following reminders and contact information useful.

Reminders

* Provide separation documentation prior to your departure
	+ Documentation may include resignation/retirement letter/email
* Update your mailing address in <https://one.uf.edu/> to ensure any official UF documentation concerning your departure is received
* Complete the Employee Exit Survey: [hr.ufl.edu/exit](http://hr.ufl.edu/exit)
	+ Survey results are completely anonymous
* Cancel your parking pass to avoid any additional charges
	+ <https://taps.ufl.edu/permits/cancel/>
* Return any UF property in your possession
	+ Keys, books, lab equipment, uniforms, computer, PCards, etc.

Important Contacts

|  |  |
| --- | --- |
| Office | Contact Information |
| Department HR Contact | Phone:Email: |
| Benefits & RetirementFor questions regarding benefits including terminal leave options (special pay plan) and COBRA. | Phone: 352-392-2477Email: benefits@ufl.edu  |
| Employee Relations  | Phone: 352-392-1072Email: EmployeeRelations@hr.ufl.edu  |
| Talent Acquisition & OnboardingFor questions regarding other employment opportunities at UF. | Phone: 352-392-2477Email: talent@hr.ufl.edu |
| Payroll & Tax Services | Phone: 352-392-1231Email: payrollhelp@admin.ufl.edu  |