

# EMPLOYEE EXIT CHECKLIST

(To be completed by departmental representative and retained in department file)

Employee Name \_\_\_\_\_

UF ID Number \_\_\_\_\_ Department/College \_\_\_\_\_

Date of Hire \_\_\_\_\_ Termination Date \_\_\_\_\_

**Reason for Separation:**

- |   |  |  |   |
|---|--|--|---|
| <input type="checkbox"/> Cancel coverage early                      | <input type="checkbox"/> Data correction               | <input type="checkbox"/> Death                             | <input type="checkbox"/> End courtesy appt                |
| <input type="checkbox"/> End extra compensation                     | <input type="checkbox"/> End PK Yonge supplement       | <input type="checkbox"/> End pre/post-doc fell appt        | <input type="checkbox"/> End summer assignment            |
| <input type="checkbox"/> End temporary job                          | <input type="checkbox"/> End time-limited job          | <input type="checkbox"/> Layoff                            | <input type="checkbox"/> Non-renewal                      |
| <input type="checkbox"/> Resignation                                | <input type="checkbox"/> TEAMS probationary dismissal  | <input type="checkbox"/> Terminate additional pay/lump sum | <input type="checkbox"/> Termination for cause            |
| <input type="checkbox"/> Transfer job to new employee record number | <input type="checkbox"/> Went to state agency position | <input type="checkbox"/> Work authorization expiration     | <input type="checkbox"/> Workers' compensation settlement |

Forwarding Address \_\_\_\_\_

**Purpose:** The following checklist is provided to assist all University of Florida employees with the exit process. Employees leaving the university should be aware of their rights and benefits, which include terminal leave options (special pay plan) and COBRA. In addition, departing employees have an obligation to return all university property issued to them and to settle all outstanding accounts. For your convenience, a departmental representative has been assigned to assist you with the exit process.

**Checklist: check one**

**Yes (N/A)**

**Yes (N/A)**

<b>Employee's Responsibility</b>				
Key(s) returned			Complete Employee Exit Survey	
Closed all patient notes/signed charts, if applicable			Completed clinical trials documentation, if applicable	
ID/other cards returned			Library books/materials returned	
Uniforms returned			Telephone calling cards returned	
Purchasing Card and/or credit cards returned			All other UF property returned (PC's, cell phone, lab equipment, etc)	
Blue, Orange, or Official Business Parking Decal has been turned in to Traffic & Pkg			Update W-4 so your W-2 will go to correct mailing address	
<b>Supervisor's Responsibility</b>				
Provide information about Employee Exit Survey ( <a href="http://www.surveymonkey.com/s/UF_Employee_Exit_Survey">www.surveymonkey.com/s/UF Employee Exit Survey</a> )				
Reports owed under Sponsored Research				
Disclosures of inventions and copyrights				
Contact the PCard Team to cancel PCard (email to <a href="mailto:pcard@ufl.edu">pcard@ufl.edu</a> and include the cardholder's (employee's) name, UFID, and the reason for cancellation). <b>This must be done regardless if the PCard is turned in or not.</b>				
Security access to computer systems terminated (myUFL, ID, passwords, etc.)				
Lab supplies/chemical/hazardous material/work in process identified and inventoried				
If lab space was used, lab space must be "closed out" through Environmental Health and Safety				
Travel advances, salary overpayments, and cash advances repaid to UF Controller's Office				
Appropriate leave cash out ePAF submitted promptly after termination (within 2 weeks of the termination date)				
Inform exiting employee about the Special Pay Plan: <a href="http://hr.ufl.edu/retirement/other/specialpayplan.asp">http://hr.ufl.edu/retirement/other/specialpayplan.asp</a>				
Report to Sponsored Research if you are a faculty member on a grant				

*All miscellaneous debts (parking fines, tuition expenses, Health Center fees, etc.) should be settled with the university.*

**Employee Comments:**

Terminating Employee's Signature \_\_\_\_\_ Date \_\_\_\_\_

Departmental Representative's Signature \_\_\_\_\_ Date \_\_\_\_\_

## Reminder to Department/Notice to Employee

**Reminder to Departmental Representative:** Remove employee's name from authorized signature list(s) if appropriate. Also, please ensure vacation/compensatory/sick leave records have been audited as appropriate and submitted to Leave Administration. Employees should be advised of the opportunity for insurance and benefits consultation at University Benefits (pre-tax payments, COBRA benefits, etc.); call (352) 392-2477. If the terminating employee currently is on the spouse plan, he or she must contact University Benefits to convert or terminate coverage. Retiring employees should be referred to University Retirement; call (352) 392-2477.

**Notice to Employee:** The address on the Form W-4 on file will determine where your Form W-2, Wage and Tax Statement, or Form 1042-S, Foreign Person's U.S. Source Income Subject To Withholding, will be sent. You should provide a permanent address so your wages or reportable U.S. Source Income can be reported to you by the University of Florida by January 31 of the following year.

Upon terminating, TEAMS employees with children participating in the Higher Education Opportunity (HEO) program are no longer eligible for that benefit. Human Resource Services verifies eligibility in the program each semester based on whether the child's legal guardian is a full-time TEAMS employee on the first day of classes for each new semester.

If you have paid in full for your parking decal, you should contact Traffic and Parking for a reimbursement. If you chose payroll deduction to pay for your decal and **do not turn it in** when separating from the university, Traffic and Parking will deduct the amount still owed from your final paycheck.

Leave Cash out entitlement chart is located on the HR website which is as follows:

[http://www.hr.ufl.edu/training/myUFL/instructionguides/leave%20 cash out chart.pdf](http://www.hr.ufl.edu/training/myUFL/instructionguides/leave%20cash%20out%20chart.pdf)