

Employee Exit Checklist

Name of Employee: _____ UFID: _____

Termination Date: _____ Department: _____

Reason for Separation:

- | | | |
|--|---|--|
| <input type="checkbox"/> Death | <input type="checkbox"/> End Courtesy Appointment | <input type="checkbox"/> TEAMS Probationary Dismissal |
| <input type="checkbox"/> End Extra Compensation | <input type="checkbox"/> End Summer Assignment | <input type="checkbox"/> Termination for Cause |
| <input type="checkbox"/> End Temporary Job | <input type="checkbox"/> Layoff | <input type="checkbox"/> Work Authorization Expiration |
| <input type="checkbox"/> End Time-Limited Job | <input type="checkbox"/> Non-Renewal | |
| <input type="checkbox"/> End Pre/Post-Doc Fellow Appointment | <input type="checkbox"/> Resignation | |
| | <input type="checkbox"/> Retirement | |

Two Weeks Prior to Term: Supervisor Responsibilities

Yes N/A

	Update job description if needed and submit Request to fill for replacement
	Ask employee to make a cheat sheet/transition guides for work items that are unique to their position
	For employees transferring departments/college/unit within UF: Contact Department Security Administrator (Christina Perez or Amanda Phelps)
	Travel advances, salary overpayments, cash advances and other debt owed including Paid Parental Leave repaid to UF, or a repayment plan has been finalized with Payroll and/or Central Leave
	PCard Team contacted to cancel PCard (email to pcard@ufl.edu and include the cardholder's (employee's) name, UFID, and the reason for cancellation). This must be done regardless if the PCard is turned in or not.

One Week Prior to Term: Supervisor Responsibilities/Reminders to provide to Employee

Yes N/A

	Provide Page 3 of Exit Checklist "Notice to Employee"
	Verify mailing address and update information in myUFL so that W-2 information and final payments are forwarded to the correct address
	Key(s) Returned
	UFID Returned
	Purchasing Card and/or Credit Cards Returned
	All other UF property returned (PC's, cell phone, lab equipment, etc.)
	Uniforms Returned
	Employee notified to turn Parking Decal into Traffic & Parking: (352) 392-7275
	Clinical employees/Faculty: Completed clinical trials documentation/chart notes have been made available to remaining applicable staff
	Faculty members on a grant: Reports owed under Sponsored Research
	Disclosures of inventions and copyrights have been made available
	All critical information to the position located on employees' personal drive or other locations, such as a thumb drive, necessary to the position should be identified before employee's departure and transferred to a location accessible to the supervisor and relevant staff in the area
	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

Removal of Employee Access

For those who have terminated from UF and **no longer have any UF affiliation**, put an [IT Ticket](#) in and make sure to include the below information in the ticket:

- a. Employee name, UFID number and Gatorlink username
- b. Request account deprovisioning. This ensures that gatorlink account is disabled.
- c. Removal of @dental email account
- d. Removal of all UFCD Shared Drive folder access
- e. Removal from all UFCD Distribution lists
- f. Removal of access from all UFCD software/applications (provide listing in ticket)

If an employee **transfers to another college/unit on campus**, include the below information in the ticket:

- a. Employee name, UFID number and Gatorlink username
- b. Removal of @dental email account. Make sure to note in the ticket that the employee is transferring to another area on campus and should no longer have the @dental.
- c. Removal of all UFCD Shared Drive folder access
- d. Removal from all UFCD Distribution lists
- e. Removal of access from all UFCD software/applications (provide listing in ticket)

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 instructed to contact the University Benefits office several weeks prior to separating employment to ensure proper termination of insurance deductions which will help to avoid either over or underpayments. Retiring employees should be referred to the University Retirement office. Both departments can be contacted at 352-392-2477.

Notice to Employee

Mailing Address: 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.

Benefits: At least 2-3 weeks prior to your last day of employment, you should contact the University Benefits office at 352-392-2477 regarding when coverage terminates, premium payments, COBRA benefits, etc. Benefits that are not properly closed out may cause underpayments resulting in cancellation of your insurance or overpayments requiring refunds.

Retirement: Before separation, contact the University Benefits office at 352-392-2477 to discuss your retirement funds and options. **OPS Employees:** Visit <https://benefits.hr.ufl.edu/retirement/fica-alternative-plan/> for rollover/distribution forms, contact University Benefits office at 352-392-2477 or contact VALIC at (800) 448-2542 or (352) 367-2409.

Parking Decal: 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.

Other Important Information before exit:

- Faculty, TEAMS, and USPS – **Special Pay Plan:** <https://benefits.hr.ufl.edu/retirement/special-pay-plan/>
- Faculty, TEAMS, and USPS – **Leave Cash out entitlement chart:** <https://benefits.hr.ufl.edu/wp-content/uploads/sites/3/2018/06/leave-entitlement-chart.pdf>