



**Human Resources**  
 282 Champions Way  
 PO Box 3062410  
 Tallahassee, FL 32306-2410  
 Phone: 850-644-9610  
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**SEPARATION CHECKLIST**  
**All Employees (Salaried, OPS and Courtesy)**

Employee's Last Name, First, Middle Initial	Employee ID and Record Number	Termination Effective Date (Day after last day worked)
Position Title	Department	Department Representative
<input type="checkbox"/> USPS	<input type="checkbox"/> A&P	<input type="checkbox"/> Faculty (Salary)
		<input type="checkbox"/> OPS/Courtesy
		Phone Number

**REMINDER: Employees transferring to another FSU Department do not complete this form. Refer to the "Employee Transfer Checklist" on the HR Website for employee transfer procedures.**

**I. DEPARTMENT REPRESENTATIVE RESPONSIBILITIES:**

Review Separation Checklist with employee and complete Personnel Action Form (ePAF/pPAF)

- USPS and A&P** - Submit ePAF/pPAF and Separation Checklist to the Office of Human Resources
- Faculty (Salary)** - Submit ePAF/pPAF and Separation Checklist to the Office of Human Resources. If the faculty member recorded their attendance & leave after 12/17/2004 on a pay and leave report, these records will need to be submitted to the Office of Human Resources.
- OPS and Courtesy** - Separation Checklist should remain in the departmental file. If the appointment ends prior to the expiration date in OMNI, submit a PAF to the Office of Human Resources.

Please complete items 1-16, initial and date lines as completed. As you progress through the items, list departments and contact persons where debt exists and attach it to this form. After discussing with the employee any debt owed to FSU, notify Accounts Receivable (644-9436) to initiate the collection on the final paycheck(s). Obtain the signature of the separating employee's supervisor.

**Initial    Date**

- |       |       |   |
|-------|-------|---|
| _____ | _____ | 1. <b>NETWORK ACCESS / PASSWORD SECURITY / SECURITY</b>   |
|       |       | a. OMNI Roles - All OMNI roles should be removed via Online Role Request (eORR) the morning after an employee's separation. Additional actions are required for: <ul style="list-style-type: none"> <li>1. FSU_DPT_TE_DEPTID_APPROVERS, also submit the <a href="#">Travel Approver Roles &amp; Security Information</a> form.</li> </ul>   |
|       |       | b. NWRDC (Student Systems) – Complete the <a href="#">Computer System Application Access</a> form to remove access to Student Administration Applications.  |
|       |       | c. Third Party System access - Remove any other system access (i.e. systems other than OMNI or NWRDC, which may be used by the department but not by the whole university).   |
| _____ | _____ | 2. <b>DEPARTMENT DESIGNATIONS</b> - Run OMNI query FSU_CF_DEPT_ALL_DESIGNATIONS (FI) to determine if the separating employee is a Budget Manager, Authorized Signer, Hyperion Salary/Budget Preparer or Dean/Director/Department Head/Chair. To remove the employee, complete the Budget Office form, <a href="#">Update Existing Department ID</a> .   |
| _____ | _____ | 3. <b>LIBRARY</b> - Contact Strozier Library to verify return of books and materials (645-8822 or 645-8823); to verify the return of library carrel keys (644-5268).  |
| _____ | _____ | 4. <b>KEYS</b> - Building and office keys returned to Key Bank at 150 MMA (Mendenhall Maintenance, Building A) which is located on Learning Way or Departmental Representative.   |
| _____ | _____ | 5. <b>LEAVE RECORDS</b> - For USPS, A&P and FACULTY - pay and leave reports, non-exempt timesheets, and OMNI timesheets (as appropriate) have been audited by the time/leave coordinator or the supervisor. Audit should be done <b>after</b> the last day of employment and final leave accruals have processed. For Faculty, submit Pay and Leave Reports to the Office of Human Resources; for A&P and USPS, retain Pay and Leave Reports in the department. |
| _____ | _____ | 6. <b>I-9 RECORDS</b> - Terminate employee in Guardian with the effective date of separation. If not found in Guardian, contact the I-9 Administrator to terminate the paper I-9. Additional information can be obtained at: <a href="http://hr.fsu.edu/content/i9">http://hr.fsu.edu/content/i9</a> .  |

**DEPARTMENT REPRESENTATIVE RESPONSIBILITIES (cont'd):**

Initial    Date

- \_\_\_\_\_    \_\_\_\_\_    7. **OUTSTANDING DEBTS**
- a. *Cash Advances / Petty Cash Funds* - Run the FSU\_DPT\_AP\_OPEN\_ITEM\_BAL query to check for any outstanding cash advances. If an outstanding debt exists, contact Disbursement Services (644-5021).
  - b. *Travel Advances* - Run the FSU\_DPT\_TE2\_ADVANCES query to check for any outstanding travel advances. If an outstanding debt exists, contact Travel (644-5021).
  - c. *Salary Overpayments* - Contact Payroll Services by submitting a case via the FSU service center or emailing [payroll@fsu.edu](mailto:payroll@fsu.edu) to verify employee repayment options.
  - d. *Miscellaneous Debts* - Contact Student Financial Services (644-4257) to identify any outstanding debts.
  - e. *Employee FSU Payroll Deductions* - Contact Payroll Services by submitting a case via the FSU Service Center or emailing [payroll@fsu.edu](mailto:payroll@fsu.edu) to verify if employee has an outstanding balance for FSU Foundation Loans or FSU Employee Accounts Receivables.
- \_\_\_\_\_    \_\_\_\_\_    8. **PARKING** – Contact Transportation & Parking Services to deactivate virtual parking permit. Gate cards and remote gate openers must be returned (644-5278).
- \_\_\_\_\_    \_\_\_\_\_    9. **PROPERTY**
- a. Verify any short term loans of laptops or other equipment have been returned to the Departmental Inventory Custodian.
  - b. Notify Property Accounting Services (644-9756) if the separating employee has any FSU equipment with a cost of \$5,000 or greater checked out using the Equipment Use Form ER 244, and verify that equipment has been returned. The following query can be run for your department - FSU\_DPT\_AM\_OFFSITE\_ASSETS.
  - c. Notify Property Accounting Services if the separating employee is an Inventory Taker, Custodian or Manager. The following query can be run for your department – FSU\_DPT\_AM\_PROPERTY\_ROLES.
- \_\_\_\_\_    \_\_\_\_\_    10. **PURCHASING CARD (P-Card)**
- a. *Cardholders* - Contact the P-Card Administrator ([nmilburn@fsu.edu](mailto:nmilburn@fsu.edu)) to verify the card has been returned by the cardholder.
  - b. *Proxies* - Submit the [Proxy Termination Transfer](#) form to the P-Card Administrator. The FSU\_DPT\_PCARD\_PROXYUSERS query can be run to determine the proxies in your department.
- \_\_\_\_\_    \_\_\_\_\_    11. **TRAVEL CARD (T-Card)** - Turn in the Travel Card to the T-Card Administrator ([jpittman@fsu.edu](mailto:jpittman@fsu.edu)) a minimum of two weeks prior to leaving department using the [Travel Card Termination](#) form.
- \_\_\_\_\_    \_\_\_\_\_    12. **INFORM EMPLOYEE OF EXIT INTERVIEW PROCESS** - For USPS and A&P, contact Human Resources (644-6475); for Faculty, contact the Office of Faculty Development and Advancement (644-6876).
- \_\_\_\_\_    \_\_\_\_\_    13. **SWIPE CARD ACCESS** – Swipe card access should be disabled upon termination. Please have your department's Authorized Security Representative submit a CRM service ticket requesting the removal of departmental card access from the employee's personnel record.
- \_\_\_\_\_    \_\_\_\_\_    14. **SPONSORED RESEARCH** - If a PI or Co-PI on a Sponsored Project, sponsored research activity has been verified with \_\_\_\_\_ at Sponsored Research Services.
- \_\_\_\_\_    \_\_\_\_\_    15. **GRADUATE SCHOOL** - Is the employee (Faculty or Staff) on a current graduate student's committee and/or do they enter in waivers for their respective College or Department and/or do they have access to the Graduate Student Tracking system?  YES  NO If yes to any, the Graduate School has been notified of the separation (644-3501).
- \_\_\_\_\_    \_\_\_\_\_    16. **Human Resource Department Manager and Representative** - Run OMNI query FSU\_DEPT\_MNGR\_REP\_BY\_DEPT to determine if the separating employee is a Department Manager or Representative. Submit a [HR Department Table Update](#) form to update this information.

\_\_\_\_\_  
Employee's Last Name, First, Middle Initial

\_\_\_\_\_  
Employee ID and Record Number

\_\_\_\_\_  
Termination Effective Date

**II. EMPLOYEE RESPONSIBILITIES:**

**USPS/A&P/FACULTY/OPS** - Complete applicable items on checklist. **NOTE:** The employee is accountable for all assigned University property and debt owed to FSU. If assigned property is not returned and debt not paid, collection procedures will be initiated and fees charged.

Please respond to items 17-26, initial and date lines as completed or indicate N/A if not applicable.

**Initial Date**

- \_\_\_\_\_  
\_\_\_\_\_ 17. **CLEAR ANY OUTSTANDING DEBT TO THE UNIVERSITY** - Check with Departmental Representative regarding property, keys, library fines, parking, taxes owed on perquisites (including graduate tuition waivers), etc. (See #3 above)
- \_\_\_\_\_  
\_\_\_\_\_ 18. **EXIT INTERVIEW COMPLETED** - For USPS and A&P, contact Human Resources (644-6475); for Faculty, contact the Office of Faculty Development and Advancement (644-6876).
- \_\_\_\_\_  
\_\_\_\_\_ 19. **INSURANCE & BENEFITS CONFERENCE SCHEDULED** – Contact Benefits (644-4015) to discuss process for continuing or canceling insurance, reimbursement and retirement accounts.
- \_\_\_\_\_  
\_\_\_\_\_ 20. **AMERICAN EXPRESS CARD** - Contact Controller's Office American Express administrator (644-5294) or American Express directly to cancel.
- \_\_\_\_\_  
\_\_\_\_\_ 21. **PURCHASING CARD (P-Card)** - Return P-Card along with a completed [Cardholder Termination](#) form at least two weeks prior to separation to the P-Card Administrator at UCA1400 (MC: 2370).
- \_\_\_\_\_  
\_\_\_\_\_ 22. **TRAVEL CARD (T-Card)** – Return T-Card to your supervisor as minimum of two weeks prior to separation.
- \_\_\_\_\_  
\_\_\_\_\_ 23. **PROPERTY** - Return all equipment (computers, lab equipment, uniforms etc.) to the Departmental Inventory Custodian. The FSU\_DPT\_AM\_PROPERTY\_ROLES query can be run to determine who holds this responsibility in the department.
- \_\_\_\_\_  
\_\_\_\_\_ 24. **LIBRARY** - Return all books, materials, and library carrel keys to the appropriate University Library (645-8822 or 645-8823); Library Carrel Keys (644-5019).
- \_\_\_\_\_  
\_\_\_\_\_ 25. **DISPOSAL OF HAZARDOUS MATERIALS** – Researchers provided laboratory space have assessed all equipment, research materials, and samples for disposal in accordance with the [FSU Safety Manual](#). Disposition of materials and equipment must be certified by an Environmental Health & Safety Officer.
- \_\_\_\_\_  
\_\_\_\_\_ 26. **FORWARDING ADDRESS and PHONE** - An address change will ensure that applicable federal tax information, insurance/retirement information, W-2 forms, and leave payments are forwarded to the correct address. A change of address and contact phone number may be provided below **Please PRINT Forwarding Address Information:**

\_\_\_\_\_  
Street or P.O. Box

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Phone (including area code)

\_\_\_\_\_  
Email

**III. IMPORTANT EMPLOYEE INFORMATION:** Please review the following and note relevant information.

**TAX SHELTERED ANNUITY (TSA):**

A portion of the annual and/or sick leave payments may be contributed to a tax-sheltered annuity. Employees must notify the Office of Human Resources - Benefits (644-4016) within 10 working days following the date of separation. Failure to notify Benefits and complete the necessary Tax Sheltering documents within 10 days will result in the employee receiving a payout of applicable leave.

YES, I have contacted the appropriate office and the annuity agent to facilitate sheltering leave payments.

\_\_\_\_\_  
Employee's Last Name, First, Middle Initial

\_\_\_\_\_  
Employee ID and Record Number

\_\_\_\_\_  
Termination Effective Date

NO, I am not interested in a Tax Sheltered Annuity and request payment of applicable leave.

**LEAVE RECORDS, PAYOUTS and TRANSFERS:**

Employees should review their attendance & leave records maintained within the OMNI system and/or Pay & Leave Reports to ensure accuracy.

Maximum lifetime annual leave payouts are 240 hours for USPS, 352 for A&P and Faculty, and 480 for Executive Service. Employees must have completed a minimum of 10 full years of FSU service to be eligible for payment of a portion of their sick leave balance. The maximum amount of sick leave hours for which an employee may receive payment is one fourth of the employee's total sick leave hours, up to 1,920 which equates to a maximum of 480 hours in payment. Faculty hired after May 6, 2011 shall not be paid for any unused sick leave.

Annual, sick and compensatory leave payments are issued through electronic fund transfer/direct deposit the same as a regular paycheck unless funds are tax sheltered (reference TSA above). Direct deposits may be stopped by contacting the University Payroll Office (644-3813).

**REMEMBER: Do not close your bank account unless you first stop your Direct Deposit.**

If transferring to another State agency or university, **verify with the receiving agency** that they will accept your leave balances before requesting a leave transfer. Also, verify what documents are required to transfer insurance and other benefits.

Are you transferring your **annual** leave to another State agency or university?                      YES                      NO

Are you transferring your **sick** leave to another State agency or university?                      YES                      NO

If YES: Name of agency or university \_\_\_\_\_

Number of hours to be transferred: Annual \_\_\_\_\_ Sick \_\_\_\_\_

**SICK LEAVE POOL:** FSU Sick Leave Pool members may donate up to 40 hours of sick leave to the FSU Sick Leave Pool upon separation. The hours donated will be deducted from your sick leave balance prior to the calculation of payout or leave transfer.

Do you wish to donate to the SLP?     YES     NO    If Yes, number of hours \_\_\_\_\_

**FSU ID CARD:** Employees may continue to use their card as long as it has a monetary balance. However, use of FSU facilities is curtailed effective the date of separation. Employees retiring from FSU may contact the FSU Card Center (644-7777) for a retiree card.

**OTHER PAYCHECK DEDUCTIONS AND INFORMATION:** If your pay statement shows deductions for loan payments, child support, etc., contact your financial institution or appropriate source to make arrangements for payment.

**OMNI LIMITED ACCESS** – You will need to maintain your OMNI USERID and password as you will have limited access until June 1<sup>st</sup> of the year following your termination date. The access will allow you to: (1) update address, (2) view/print final pay advices, (3) view and print annual W-2 Tax and Wage Statement. If you have not already accepted the online W-2/W-2c Consent agreement, you must do so prior to January to receive the electronic form. If you have already accepted the consent agreement, no action is necessary.

**NOTE:** In accordance with Section 112.3185(4), Florida Statutes, separating employees are prohibited from having any employment with a private business entity in connection with any state contract in which they had responsibility while an employee within two years of retiring or separating. Questions regarding this requirement may be referred to Employee Labor Relations at 644-6475.

**Leave payouts issued to eligible employees are not paid any earlier than two pay periods following the date of separation. Pending checklist items may further delay the separation payout.**

**I UNDERSTAND THE ABOVE RESPONSIBILITIES AND HAVE FULFILLED MY OBLIGATIONS TO FSU.**

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Date

**Additional Comments** \_\_\_\_\_