



SEPARATION CHECKLIST
All Employees (Salaried, OPS and Courtesy)

Employee's Last Name, First, Middle Initial	Employee ID and Record Number	Separation Date		
Position Title	Department	Department Representative	Phone Number	
<input type="checkbox"/> USPS	<input type="checkbox"/> A&P	<input type="checkbox"/> Faculty (Salary)	<input type="checkbox"/> Faculty (OPS, Courtesy)	<input type="checkbox"/> OPS (Non-Faculty)

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 Human Resources
- Faculty (Salary, OPS and Courtesy)** - Submit Separation Checklist to the Department of Human Resources. If a pPAF is required, attach it to the checklist and submit with Pay and Leave Reports, if applicable, to the Department of Human Resources
- OPS (Non-Faculty)** - Separation Checklist should remain in departmental files and not sent to Human Resources. If appointment ends prior to the expiration date on OMNI, submit an ePAF to Human Resources.

Please complete items 1-17, 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. PASSWORD SECURITY - Coordinator must terminate access to FSU Computer Systems (i.e. OMNI, Student files) by submitting forms to the ITS Security Manager PRIOR to separation. |
| _____ | _____ | 2. CASH ADVANCES - Contact General Accounting (644-5021) to verify no debt exists. |
| _____ | _____ | 3. TRAVEL ADVANCES - Contact Travel Office (644-5021) to verify no debt exists or employee repayment to clear accounts. |
| _____ | _____ | 4. ACCOUNTS RECEIVABLE - Contact Student Financial Services (644-4257) to identify any outstanding miscellaneous debts. |
| _____ | _____ | 5. SALARY OVERPAYMENT - Contact Payroll (644-3813) to verify employee repayment. |
| _____ | _____ | 6. EMPLOYEE FSU PAYROLL DEDUCTIONS (Leach Center, Computer Store, etc.) - Contact Payroll (644-3813) to verify if employee has an outstanding balance. |
| _____ | _____ | 7. LIBRARY - Contact Strozier Library to verify return of books and materials (645-8822 or 645-8823); to verify the return of library carrel keys (644-5019). |
| _____ | _____ | 8. KEYS - Building and office keys returned to Key Bank or Departmental Representative. |
| _____ | _____ | 9. PARKING - Parking decals, gate cards, and remote gate openers must be returned to Parking Services (644-5278). |
| _____ | _____ | 10. PROPERTY - All equipment has been returned (computers, lab equipment, uniforms etc.). Contact Property Accounting Services (644-9756) to verify property on inventory has been returned. |

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

- _____ _____ 11. **LEAVE RECORDS** – 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 **after** the last day of employment and final leave accruals have processed. For Faculty, submit Pay and Leave Reports to the Department of Human Resources; for A&P and USPS, retain Pay and Leave Reports in the department.
- _____ _____ 12. **PURCHASING CARD** - Return card to UCA1400 (MC: 2370) and contact Purchasing at (644-6850).
- _____ _____ 13. **TRAVEL CARD** - Have employee return card to UCA 5618 and contact Travel (644-5294).
- _____ _____ 14. **INFORM EMPLOYEE OF EXIT INTERVIEW** – For USPS and A&P, contact Human Resources (644-6475); for Faculty, contact the Office of the Dean of the Faculties (644-6876).
- _____ _____ 15. If the employee is not eligible for a leave payout due to a contract or grant on 'soft monies', documentation (copy of signed contract or offer letter) must be provided with this checklist. This applies only to employees hired before January 9, 2009. Is the leave payout restricted due to a contract or grant? YES NO
- _____ _____ 16. **SPONSORED RESEARCH** - If a PI or Co-PI on a Sponsored Project, sponsored research activity has been verified with _____ at Sponsored Research Services.
Name
- _____ _____ 17. **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).

II. EMPLOYEE RESPONSIBILITIES:

USPS / A&P / FACULTY - Clear items on checklist. **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 18-26, initial and date lines as completed or indicate N/A if not applicable.

Initial Date

- _____ _____ 18. **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 above)
- _____ _____ 19. **EXIT INTERVIEW COMPLETED** - For USPS and A&P, contact Human Resources (644-6475); for Faculty, contact the Office of the Dean of the Faculties (644-6876).
- _____ _____ 20. **INSURANCE & BENEFITS CONFERENCE SCHEDULED** – Contact Benefits (644-4015) to discuss process for continuing or canceling insurance, reimbursement and retirement accounts.
- _____ _____ 21. **AMERICAN EXPRESS CARD** - Contact Controller's Office (644-5021) or American Express directly to cancel.
- _____ _____ 22. **PURCHASING CARD** - Return card to UCA1400 (MC: 2370) and contact Purchasing at 644-6850.
- _____ _____ 23. **TRAVEL CARD** - Return card to UCA 5618 and contact Travel at (644-5294).

EMPLOYEE RESPONSIBILITIES (cont'd):

- _____ 24. **PROPERTY** - All equipment has been returned (computers, lab equipment, uniforms etc.). Contact Property Accounting Services (644-9757) to verify property on inventory has been returned.
- _____ 25. **LIBRARY** – I have returned all books, materials, and library carrel keys to the appropriate University Library (645-8822 or 645-8823); Library Carrel Keys (644-5019).
- _____ 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 or you may forward a memorandum to Human Resources at a later date. Students also need to change addresses with Student Records in the Registrar's Office.

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. Employee must notify Benefits in the Department of Human Resources (644-4016) to advise of intent to shelter. Notification must occur within 10 working days of separation date.

- YES, I have contacted the appropriate office and the annuity agent to facilitate sheltering leave payments.
- NO, I am not interested in a Tax Sheltered Annuity and request payment of applicable leave.

LEAVE RECORDS, PAYOUTS and TRANSFERS:

A&P and USPS - Review annual, compensatory and sick leave records in the OMNI System with Departmental Representative.
Faculty - Review copies of pay and leave reports to ensure they are complete.

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 creditable State or University 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, if hired prior to 1973, should contact the Department of Human Resources (645-2781) for payment guidelines.

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.

IMPORTANT EMPLOYEE INFORMATION (cont'd):

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. Confirm with your Departmental Representative that the 'Comments' section of the separation Personnel Action Form indicates a transfer from FSU to another State agency or university.

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 1st 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.

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

Employee's Signature

Date

Supervisor's Signature

Date

Additional Comments _____

