



Human Resources
 282 Champions Way
 PO Box 3062410
 Tallahassee, FL 32306-2410
 Phone: 850-644-9641 (staff)
 Phone: 850-644-4017 (faculty)
 hr-attendanceleave@fsu.edu

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
		Phone Number

A&P/USPS
 Faculty (Salary)
 OPS/Courtesy (maintain in department file)

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)

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). Signature of the separating employee's supervisor is required. If employee is unavailable, please indicate this on the signature line.

Initial Date

- | | | |
|--|--|---|
| | | 1. NETWORK ACCESS / PASSWORD SECURITY / SECURITY
a. OMNI Roles – Verify all OMNI roles have been removed.
b. 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).
c. Canvas access – Separation does not remove Instructor/TA/course designer roles. Contact ODL at canvas@fsu.edu or call 644-8004 to remove access. |
| | | 2. DEPARTMENT DESIGNATIONS - Run the FSU_CF_DEPT_ALL_DESIGNATIONS (FI) query to determine if the separating employee is a Budget Manager/Concur Approver , Authorized Signer, Hyperion Salary/Budget Preparer or Dean/Director/Department Head/Chair (see Controller's Office website for details). To remove the employee, complete the Budget Office form, Update Existing Department ID . |
| | | 3. LIBRARY – Contact Strozier Library to verify return of books and materials (645-8822 or 645-8823); to verify the return of library carrel keys (644-3084). |
| | | 4. KEYS – Building and office keys returned to Key Bank at 150 MMA (Mendenhall Maintenance, Building A) which is located on Learning Way or Departmental Representative (644-9612). |
| | | 5. 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. |
| | | 6. I-9 RECORDS – 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: http://hr.fsu.edu/content/i9 . |
| | | 7. PARKING – Gate cards and remote gate openers must be returned to FSU Transportation and Parking Services. Failure to return will result in a \$30 fine for the remote or \$15 fine for the gate card (644-5278). |
| | | 8. Human Resource Department Manager and Representative – Run OMNI query FSU_DEPT_MNGR_REP_BY_DEPT (HR) to determine if the separating employee is a Department Manager or Representative. Submit a HR Department Table Update form to update this information. |

DEPARTMENT REPRESENTATIVE RESPONSIBILITIES (cont'd):

Initial Date

9. OUTSTANDING DEBTS

- a. *Petty Cash Funds* - Run the FSU_DPT_AP_OPEN_ITEM_BAL (FI) query to check for any outstanding petty cash advances. If an outstanding debt exists, contact Disbursement Services (AccountsPayable@fsu.edu) for processing details.
- b. *Auxiliary AR* – Run the FSU_AUX_EMPLOYEE_DEBT (FI) query to check for any outstanding auxiliary debts. If an outstanding debt exists, contact Auxiliary Accounting (ctl_auxiliaryaccounting@fsu.edu).
- c. *Salary Overpayments* - Contact Payroll Services by submitting a case via the FSU service center or emailing 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 to verify if employee has an outstanding balance for FSU Foundation Loans or FSU Employee Accounts Receivables.

10. PROPERTY

- a. Verify any short-term loans of laptops or other equipment have been returned to the department through your Departmental Inventory Custodian.
- b. Verify if there are any capital assets that may be “offsite” and assigned to the separating employee. Run the following query; FSU_DPT_AM_OFFSITE_ASSETS (FI). If the separating employee has FSU equipment with a cost of \$5,000 or greater checked out, please reach out to the employee to return the item. Please populate the bottom portion of the Off-Site Equipment Form and send it to the Asset Management Office when the equipment has been returned.
- c. Verify if the separating employee is an Inventory Taker, Custodian or Manager. Run the following query for your department, using the first three digits of your department number. FSU_DPT_AM_PROPERTY_ROLES (FI). Notify Asset Management via a completed Property Role Form if roles should be updated.

11. PURCHASING CARD (P-Card)

- a. *Cardholders* - Email pcard@fsu.edu and ask for the P-Card Administrator to verify the card has been returned by the cardholder.
- b. *Proxies* - Submit the Proxy Termination/Transfer Request form through SpearMart. The FSU_DPT_PCARD_PROXYUSERS (FI) query can be run to determine the proxies in your department.

12. TRAVEL

- a. *T-Card* - Supervisor is to complete the [Travel Card Cancellation Request](#) and return it to the T-Card Administrator (travelcard@fsu.edu) immediately upon notice of employee's termination; destroy the employee's T-Card; and employee is to submit expense report(s) for all available T-Card charges.
- b. *Travel Advances/Non-Travel Expense Reports/T-Card charges/Travel Requests* - Contact travel (travel@fsu.edu) to determine if any outstanding/pending Travel Cash Advances, expense reports, T-Card charges, or travel requests exist. Travel will provide processing details.

13. **INFORM EMPLOYEE OF EXIT INTERVIEW PROCESS** – For USPS and A&P, employees may visit https://hr.fsu.edu/?page=elr/elr_exit_surveys for information regarding the Exit Survey or contact the Office of Human Resources, Employee & Labor Relations (644-6475). For information on Faculty exit surveys, please contact the Office of Faculty Development & Advancement (644-6876).

14. **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.

15. **SPONSORED RESEARCH** – If a PI or Co-PI on a Sponsored Project, sponsored research activity has been verified with _____ at Sponsored Research Services (644-5260).

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).

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, travel related items, keys, library fines, parking, taxes owed on perquisites (including graduate tuition waivers), etc.
- _____ _____ 18. **EXIT SURVEY COMPLETED** – For USPS and A&P, please visit https://hr.fsu.edu/?page=elr/elr_exit_surveys for information regarding the Exit Survey. If you have any questions regarding the survey, please contact the Office of Human Resources, Employee & Labor Relations (644-6475). For Faculty exit surveys, please contact the Office of Faculty Development & Advancement (644-6876).
- _____ _____ 19. **INSURANCE & BENEFITS** – Contact Benefits (644-4015) to discuss process for continuing or canceling insurance, reimbursement and retirement accounts. State insurance benefits may continue automatically if state employment continues or resumes within a certain [time frame](#).
- _____ _____ 20. **PURCHASING CARD (P-Card)** – Return P-Card to the P-Card Administrator at UCA1400 (MC: 2370) and complete the P-Card Holder Termination Request in [SpearMart](#) at least two weeks prior to separation.
- _____ _____ 21. **TRAVEL CARD (T-Card)** – A minimum of two weeks prior to separation, return T-Card to your supervisor for destruction. Submit Concur expense report for all available T-Card charges.
- _____ _____ 22. **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.
- _____ _____ 23. **LIBRARY** – Return all books, materials, and library carrel keys to the appropriate University Library (645-8822 or 645-8823); Library Carrel Keys (644-3084).
- _____ _____ 24. **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.
- _____ _____ 25. **FORWARDING EMAIL, MAILING ADDRESS and PHONE** – Please provide a valid, personal email address along with any changes to your mailing address and telephone number to ensure all notices and forms related to annual federal W-2 forms, insurance/retirement information, and leave payments are forwarded to the correct email and/or mailing address. **Please PRINT the updated information below:**

Street or P.O. Box

City

State

Zip

Phone (including area code)

Email

- _____ _____ 26. **CONSENT TO RECEIVE ELECTRONIC W-2** – See Payroll training materials [Consenting to Electronic W-2](#) and follow instructions to consent. If you have already accepted the consent agreement, no action is necessary. An email will be sent to your preferred email address (see item 25) when W-2 forms are available to download in January.

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.

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

Employee's Last Name, First, Middle Initial

Employee ID and Record Number

Termination Effective Date

LEAVE RECORDS, PAYOUTS and TRANSFERS:

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.

EMAIL: Per [4-OP-H-13 Electronic Mail Policy](#), separated employees will generally lose access to University email and other Microsoft 365 applications.

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.

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 _____

