

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, check the boxes as completed and sign below. As you progress through the items, discuss with the employee any debt or property owed to FSU. Notify Accounts Receivable (850-644-9436) to initiate the collection on the final paycheck(s). Signature of the separating employee's supervisor and department representative are required. If an employee is unavailable, please indicate this on the signature line.

- ☐ 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 850-644-8004 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** – Email the Library Fines Management Department (Lib-FinesManagement@fsu.edu) to verify return of library materials (books, carrel keys, etc.). Include the separating employee's name and EMPLID.
- ☐ 4. **KEYS** – Building and office keys returned to Key Bank (850-644-9612 or keyshop@fsu.edu) at 150 MMA (Mendenhall Maintenance, Building A) or to the Departmental Representative.
- ☐ 5. **LEAVE RECORDS** – For USPS, A&P and FACULTY - pay and leave reports, non-exempt timesheets, and OMNI timesheets (as appropriate) have been audited or reviewed by the time/leave coordinator or the supervisor. Audits 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 [I-9 information](#).
- ☐ 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 (850-644-5278 or transportation@fsu.edu).
- ☐ 8. **HUMAN RESOURCE DEPARTMENT MANAGER & REPRESENTATIVE** – Run OMNI 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):☐**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. *Miscellaneous Debts* - Contact Student Financial Services (850-644-4257 or ctl-accountsreceivable@fsu.edu) to identify any outstanding debts.
- d. *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](https://www.spearmart.com). 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.

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13. **ASK EMPLOYEE TO COMPLETE THE EXIT SURVEY ONLINE & PROVIDE SURVEY LINK** – Executive Service, A&P, USPS and OPS, may visit the [Employee Exit Survey](#) to complete the Staff Exit Survey before their last day worked. For Faculty Exit surveys, please contact the Office of Faculty Development & Advancement (850-644-6876).

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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.

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15. **SPONSORED RESEARCH** – If a PI or Co-PI on a Sponsored Project, sponsored research activity has been verified with at Sponsored Research Services (SRA-pre@fsu.edu).

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16. **GRADUATE SCHOOL** – Does the employee (Faculty or Staff) have any access to systems managed by the Graduate School or on a student committee (e.g. GST, GFS, Slate, Waivers, Manuscript Clearance Portal)? ☐ YES ☐ NO If yes to any, the Graduate School has been notified of the separation.
Contact: Ashley Jarvis (a.jarvis@fsu.edu).

BY SIGNING BELOW I ACKNOWLEDGE THAT I HAVE REVIEWED AND COMPLETED THE ABOVE ITEMS.

Department Representative Signature

Date

Employee's Last Name, First, Middle Initial

Employee ID and Record Number

Termination Effective Date
(Day after last day worked)

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 check the boxes as completed.

- ☐ 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.
- a. Library – Return all books, materials, and library carrel keys to the appropriate University Library.
 - b. Parking – Return gate cards and remote gate openers 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.
 - c. Keys – Return all building and/or office keys to the department representative or key shop.
- ☐ 18. **FORM 1 FILERS** - Employees required to file annual financial disclosures with the Florida Commission on Ethics must complete a Form 1F within sixty (60) days of leaving public office or employment. Download the current version of the [Form 1F](#), and contact the FSU [Office of Compliance and Ethics](#) for assistance.
- ☐ 19. **VENDOR EMPLOYMENT** – If you are accepting employment with, or considering a position, at a private business that is an FSU vendor, please contact compliance@fsu.edu to consult on any applicable ethics laws that may affect your new role.
- ☐ 20. **EXIT SURVEY COMPLETED** – For Executive Service, A&P, USPS and OPS, please visit the [Employee Exit Survey](#) to complete the Staff Exit Survey before your last day worked. If you have any questions regarding the survey, please contact the Office of Human Resources, Employee & Labor Relations (850-644-6475). For Faculty exit surveys, please contact the Office of Faculty Development & Advancement (850-644-6876).
- ☐ 21. **INSURANCE & BENEFITS** – Contact Benefits at insurance@fsu.edu to discuss the process for continuing or canceling insurance, reimbursement, and retirement accounts. State insurance benefits may continue automatically if state employment continues or resumes within a specific [time frame](#).
- ☐ 22. **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.
- ☐ 23. **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.
- ☐ 24. **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.
- ☐ 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 EMAIL, MAILING ADDRESS and PHONE** – Please provide a valid, personal email address and any changes to your mailing address or telephone number to ensure all notices and forms are forwarded to the correct email and/or mailing address. **PRINT the updated information below:**

Street or P.O. Box

City

State

Zip

Phone (including area code)

Email

- ☐ 27. **RECEIVE ELECTRONIC W-2** – Please [Consent to Electronic W-2](#) delivery. If you have already accepted the consent agreement, no action is necessary. **You will need to maintain your OMNI USERID, password, and DUO Mobile App as you will have access until October 15th of the year following your termination date to view/print your annual W-2 Tax and Wage Statement.**
- ☐ 28. **RETIREE EMAIL** – Retiring employees can maintain access to their University email.
- ☐ NO, I am not interested in maintaining access to my University email and it will be disabled.

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

TAX SHELTERING: A portion of the annual and/or sick leave payments may be tax deferred. **Employees must notify the Office of Human Resources-Benefits (retirement@fsu.edu) within 10 business days following the date of separation.** Failure to notify benefits and set-up the deferral account, will result in your leave payout being paid to you minus applicable taxes.

☐ YES, I plan to tax shelter my leave payout to [FSU's voluntary 403\(b\) plan](#). The Leave Payout 403(b) Deferral Authorization (pg. 5) must be emailed to retirement@fsu.edu within 10 days of separation.

☐ YES, I plan to tax shelter my leave payout to a 457 with the [Florida Deferred Compensation Plan](#). The Leave Payout 403(b) Deferral Authorization (pg.5) must be emailed to retirement@fsu.edu **and** the [Deferral from Special Supplemental Pay form and Participant Action Form](#) must be submitted to defcompleavepayout@myfloridacfo.com within 10 days of my separation date.

☐ NO, I am not interested in tax sheltering and request payment of my accrued leave (if applicable).

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 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.

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. Leave will be transferred to the receiving agency once HR has received this document. 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, the use of FSU facilities is curtailed effective the date of separation. Employees retiring from FSU may contact the FSU Card Center (850-644-7777) 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, password, and DUO Mobile App as you will have limited access until October 15th of the year following your termination date. The access will allow you to (1) update your address, (2) view/print final pay advices, (3) view/print your annual W-2 Tax and Wage Statement.

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 850-644-6475.

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

Leave Payout Sheltering Form

***If you are NOT planning on having your leave payout tax sheltered, you do NOT have to complete this form**

282 Champions Way
PO Box 3062410
Tallahassee, FL 32306-2410
Phone: (850) 645-2303 Fax: (850) 645-9509

A. Employee Information:

Name (Last, First)

OMNI ID#

Email Address

Daytime Phone Number

B. Leave being deferred

☐ Annual Leave Payout

☐ Sick Leave Payout

☐ Compensatory Leave Payout

C. Indicate the type of account:

☐ 403(b) (Pre-tax)

☐ Roth 403(b) (post-tax)

☐ 457 Deferred Compensation (Pre-tax)

☐ Roth 457 Deferred Compensation (Post-tax)

**To defer leave payouts to a 457 account, you must complete the [Deferrals From Special Supplemental Pay](#) forms and submit the documents to Deferred Compensation at defcompleavepay@myfloridacfo.com.*

D. Indicate the amount you want to defer next to the applicable vendor(s):

*(*Indicate "Max" to defer entire payout up to the IRS annual limit.)*

403(b) Deferrals

Vendor	Amount (specify \$ or %)
TIAA	
Corebridge Financial	
Voya Financial	

457 Deferrals

Vendor	Amount (specify \$ or %)
Nationwide	
Corebridge Financial	
Voya Financial	

E. Additional Action:

☐ Enroll and/or confirm active salary deferral in Retirement@Work

☐ Submit the required account contract(s) for the selected vendor(s)

F. Acknowledgement, authorization, and signature:

Existing Salary Deferral and Vendor Contract: Prior to completing this agreement, I have enrolled in a 403(b) or 457 account, with the vendor(s) selected above, through the Retirement@Work portal or the Florida Deferred Compensation Plan, and I have submitted the required account contract(s) for the selected vendor(s). **I understand that failure to enroll in active salary deferrals and/or complete the vendor contract(s) prior to my leave payout being processed will result in my payout being issued through electronic fund transfer/direct deposit.**

IRS Contribution Limits: The 402(g) annual limit includes elective deferrals to 403(b) plans, including Roth, Tax-Deferred and the SUSORP, 401(k) plans and the federal government's Thrift Savings Plan, including contributions to other employer plans.

Deferral Authorization: This Leave Payout 403(b) Deferral Authorization form must be signed in order to be processed. By signing this form, I understand that this agreement is legally binding and irrevocable with respect to amounts earned while it is in effect. In addition, I am responsible for the accuracy of the deferred amounts stated in this authorization; for any overstatement of the amounts excludable as a leave payout deferral in this agreement; or any other violation of the requirements of Sections 403(b), 402(g) and/or 415, IRC; and for any additional taxes, interest and penalties that may be assessed.

Employee Signature

Date

**** Submit completed form to the HR Retirement office, via fax to (850) 645-9509, or email: retirement@fsu.edu ****