



**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**

- |  |  |   |
|--|--|---|
|  |  | <b>1. NETWORK ACCESS / PASSWORD SECURITY / SECURITY</b><br>a. OMNI Roles – Verify all OMNI roles have been removed.<br>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).<br>c. Canvas access – Separation does not remove Instructor/TA/course designer roles. Contact ODL at <a href="mailto:canvas@fsu.edu">canvas@fsu.edu</a> or call 644-8004 to remove access. |
|  |  | <b>2. DEPARTMENT DESIGNATIONS</b> - 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 <a href="#">Controller's Office website</a> for details). To remove the employee, complete the Budget Office form, <a href="#">Update Existing Department ID</a> .   |
|  |  | <b>3. LIBRARY</b> – Email the Library Fines Management Department ( <a href="mailto:Lib-FinesManagement@fsu.edu">Lib-FinesManagement@fsu.edu</a> ) to verify return of library materials (books, carrel keys, etc.). Include the separating employee's name and EMPLID.   |
|  |  | <b>4. KEYS</b> – Building and office keys returned to Key Bank (644-9612 or <a href="mailto:keyshop@fsu.edu">keyshop@fsu.edu</a> ) at 150 MMA (Mendenhall Maintenance, Building A) or to Departmental Representative.   |
|  |  | <b>5. 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.   |
|  |  | <b>6. 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> .  |
|  |  | <b>7. PARKING</b> – 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 or <a href="mailto:transportation@fsu.edu">transportation@fsu.edu</a> ).   |
|  |  | <b>8. Human Resource Department Manager and Representative</b> – Run OMNI query FSU_DEPT_MNGR_REP_BY_DEPT (HR) to determine if the separating employee is a Department Manager or Representative. Submit a <a href="#">HR Department Table Update</a> 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](mailto: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](mailto:ctl_auxiliaryaccounting@fsu.edu)).
  - 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 or [ctl-accountsreceivable@fsu.edu](mailto:ctl-accountsreceivable@fsu.edu)) 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.
- \_\_\_\_\_ \_\_\_\_\_ 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](mailto: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](mailto: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](mailto: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](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 ([SRA-pre@fsu.edu](mailto:SRA-pre@fsu.edu)).
- \_\_\_\_\_ \_\_\_\_\_ 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](mailto:a.jarvis@fsu.edu)).

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, 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 [here](#), and contact the FSU [Office of Compliance and Ethics](#) for assistance.
- \_\_\_\_\_ \_\_\_\_\_
19. **EXIT SURVEY COMPLETED** – For USPS and A&P, please visit [https://hr.fsu.edu/?page=elr/elr\\_exit\\_surveys](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).
- \_\_\_\_\_ \_\_\_\_\_
20. **INSURANCE & BENEFITS** – Contact Benefits at [insurance@fsu.edu](mailto: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](#).
- \_\_\_\_\_ \_\_\_\_\_
21. **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.
- \_\_\_\_\_ \_\_\_\_\_
22. **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.
- \_\_\_\_\_ \_\_\_\_\_
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.
- \_\_\_\_\_ \_\_\_\_\_
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 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

- \_\_\_\_\_ \_\_\_\_\_
27. **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.
- \_\_\_\_\_ \_\_\_\_\_
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.

**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](mailto:retirement@fsu.edu)) within 10 business days following the date of separation. **Failure to notify benefits, establish a 403(b) account, set up a salary deferral, or work with the Bureau of Deferred Comp, within 10 business days, will result in your leave payout being paid to you as a direct deposit minus applicable taxes.**

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- 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](mailto: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](mailto:retirement@fsu.edu) **and** the [Deferral from Special Supplemental Pay form and Participant Action Form](#) must be submitted to [defcompleavepayout@myfloridacfo.com](mailto: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. 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 (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 1<sup>st</sup> 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 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



FLORIDA STATE UNIVERSITY  
 OFFICE OF HUMAN RESOURCES  
 282 Champions Way  
 PO Box 3062410  
 Tallahassee, FL 32306-2410  
 Phone: (850) 645-2303  
 Fax: (850) 645-9509

## Leave Payout 403(b) Deferral Authorization

[Note: For deferrals to a 457 Deferred Compensation account, please complete paperwork linked in Section C]

### 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) Tax-Sheltered Annuity (Pre-tax)      Roth 403(b) (Post-tax)      \*457 Florida Deferred Compensation

*\*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](mailto:defcompleavepay@myfloridacfo.com).*

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

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

Vendor	Amount (specify \$ or %)
<b>TIAA</b>	
<b>Corebridge Financial</b>	
<b>Voya Financial</b>	

### 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) Tax-Sheltered Annuity and/or Roth 403(b) salary deferral, with the vendor(s) selected above, through the Retirement@Work portal, 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](mailto:retirement@fsu.edu) \*\***