

EMPLOYEE EXIT CHECKLIST

(To be completed by departmental representative and retained in department file)

Employee Name _____

UF ID Number _____ Department/College _____

Date of Hire _____ Termination Date _____

Reason for Separation:

- | | | | |
|---|--|--|---|
| <input type="checkbox"/> Data correction | <input type="checkbox"/> Death | <input type="checkbox"/> End of Program Notice
(on employer sponsored visa) | <input type="checkbox"/> End courtesy appt |
| <input type="checkbox"/> End extra compensation | <input type="checkbox"/> End PK Yonge
supplement | <input type="checkbox"/> End pre/post-doc fell
appt | <input type="checkbox"/> End summer assignment |
| <input type="checkbox"/> End temporary job | <input type="checkbox"/> End time-limited job | <input type="checkbox"/> Layoff | <input type="checkbox"/> Non-renewal |
| <input type="checkbox"/> Resignation | <input type="checkbox"/> Retirement | <input type="checkbox"/> TEAMS probationary
dismissal | <input type="checkbox"/> Terminate additional
pay/lump sum |
| <input type="checkbox"/> Termination for cause | <input type="checkbox"/> Transfer job to new
employee record number | <input type="checkbox"/> Work authorization
expiration | <input type="checkbox"/> Workers' compensation
settlement |

Forwarding Address _____

(Verify address information so that W-2 information and final payments are forwarded to the correct address.)

Purpose: The following checklist is provided to assist all University of Florida employees with the exit process. Employees leaving the university should be aware of their rights and benefits, which include terminal leave options (special pay plan) and COBRA. In addition, departing employees have an obligation to return all university property issued to them and to settle all outstanding accounts. For your convenience, a departmental representative has been assigned to assist you with the exit process.

Checklist: *check one* Yes (N/A) Yes (N/A)

Employee's Responsibility					
Key(s) returned			Complete Employee Exit Survey		
Closed all patient notes/signed charts, if applicable			Completed clinical trials documentation, if applicable		
ID/other cards returned			Library books/materials returned		
Uniforms returned			Telephone calling cards returned		
Purchasing Card and/or credit cards returned			All other UF property returned (PC's, cell phone, lab equipment, etc)		
Blue, Orange, or Official Business Parking Decal has been turned in to Traffic & Pkg			Update W-4 so your W-2 will go to correct mailing address		
Supervisor's Responsibility					
Provide information about Employee Exit Survey (www.surveymonkey.com/s/UF_Employee_Exit_Survey)					
Reports owed under Sponsored Research					
Disclosures of inventions and copyrights					
Contact the PCard Team to cancel PCard (email to pcard@ufl.edu and include the cardholder's (employee's) name, UFID, and the reason for cancellation). <i>This must be done regardless if the PCard is turned in or not.</i>					
Security access to computer systems terminated (myUFL, ID, passwords, etc.)					
Lab supplies/chemical/hazardous material/work in process identified and inventoried					
If lab space was used, lab space must be "closed out" through Environmental Health and Safety					
Travel advances, salary overpayments, and cash advances repaid to UF Controller's Office					
Appropriate leave cash out ePAF submitted promptly after termination (within 2 weeks of the termination date)					
Inform exiting employee about the Special Pay Plan: http://hr.ufl.edu/benefits/retirement/special-pay-plan/					
Report to Sponsored Research if you are a faculty member on a grant					

All miscellaneous debts (parking fines, tuition expenses, Health Center fees, etc.) should be settled with the university.

Employee Comments:

Terminating Employee's Signature _____ Date _____

Departmental Representative's Signature _____ Date _____

Reminder to Department/Notice to Employee

Reminder to Departmental Representative: Remove employee's name from authorized signature list(s) if appropriate. Also, please ensure vacation/compensatory/sick leave records have been audited as appropriate and submitted to Leave Administration. Employees should be instructed to contact the University Benefits office several weeks prior to separating employment to ensure proper termination of insurance deductions which will help to avoid either over or underpayments. Retiring employees should be referred to the University Retirement office. Both departments can be contacted at (352_ 392.-2477.

Notice to Employee: The address on the Form W-4 on file will determine where your Form W-2, Wage and Tax Statement, or Form 1042-S, Foreign Person's U.S. Source Income Subject To Withholding, will be sent. You should provide a permanent address so your wages or reportable U.S. Source Income can be reported to you by the University of Florida by January 31 of the following year.

At least 2-3 weeks prior to your last day of employment, you should contact the University Benefits office regarding when coverage terminates, premium payments, COBRA benefits, etc. Benefits that are not properly closed out may cause underpayments resulting in cancellation of your insurance or overpayments requiring refunds.

Upon terminating, TEAMS employees with children participating in the Higher Education Opportunity (HEO) program are no longer eligible for that benefit. Human Resource Services verifies eligibility in the program each semester based on whether the child's legal guardian is a full-time TEAMS employee on the first day of classes for each new semester.

If you have paid in full for your parking decal, you should contact Traffic and Parking for a reimbursement. If you chose payroll deduction to pay for your decal and **do not turn it in** when separating from the university, Traffic and Parking will deduct the amount still owed from your final paycheck.

Leave Cash out entitlement chart is located on the HR website which is as follows:
[http://www.hr.ufl.edu/training/myUFL/instructionguides/leave%20cash_out_chart.pdf](http://www.hr.ufl.edu/training/myUFL/instructionguides/leave%20cash%20out%20chart.pdf)

(updated 6/3/2014)