

EMPLOYEE OFFBOARDING: SEPARATION

UNIVERSITY of FLORIDA ***Plant Pathology Use Only***

When an organization and an employee make the decision to part ways, it is important to make the transition as smooth as possible. This form is designed to assist you in making this a comprehensive and efficient process. Pages 1-4 are to be completed by departmental HR and/or the supervisor while page 5 is a resource page for the departing employee.

A departing employee is defined as one who is separating from the university and will not be transferring to another unit. Departments with an employee who is transferring to another unit should complete the [Exit Checklist: Transfer](#).

Note: employees who have a position number (TEAMS, Faculty, USPS, etc.) and who may be transferring into a non-position numbered appointment (OPS, Courtesy Faculty, etc.) should use this checklist for separation as the tasks below are more comprehensive.

Completed by Departmental HR & Supervisor

Who is Leaving?

| | |
|-------------|----------------------|
| Name: | |
| UFID: | Date of Hire: |
| Department: | Date of Termination: |

Reason for Separation

Provide reason for separation below (i.e., resignation, layoff, non-renewal, end of temporary assignment, etc.)

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Keeping in Touch After the Departure (Employee/Supervisor)

Mailing information should be verified to ensure official UF documents and final payments are forwarded to the correct address. If the mailing address in myUFL is different, please update.

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| Mailing Address: |
| Email Address: |
| Phone Number: |

Making Changes in myUFL

| Action | Completed if applicable |
|--------|-------------------------|
|--------|-------------------------|

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|--|---------------------------------|
| Collect termination documentation (i.e., resignation letter/email, non-renewal letter, etc.) | Supervisor provides to IFAS-FSC |
| Enter employee's termination date with appropriate reason code in the myUFL system and include termination documentation | IFAS-FSC |
| Process any non-reimbursed travel expenses through the department prior to termination date | IFAS-FSC |

Sponsored Research Actions (Supervisor)

If the departing employee had sponsored research responsibilities, please complete the following tasks.

| Action | Completed if applicable |
|---|--------------------------|
| Notify Sponsored Research if the departing employee is a faculty member on a grant at https://research.ufl.edu/forms/notification-of-departing-pi.html | <input type="checkbox"/> |
| Verify any outstanding reports pending for Sponsored Research are submitted | <input type="checkbox"/> |
| Verify disclosures of inventions and copyrights are submitted | <input type="checkbox"/> |
| Ensure lab supplies/chemical/hazardous material/work in process are identified and inventoried | <input type="checkbox"/> |
| If lab space was used, lab space must be "closed out" through Environmental Health and Safety | <input type="checkbox"/> |

Notify Departing Employee

When an employee separation occurs, it is important to inform the departing employee of their rights and benefits.

| Action | Completed if applicable |
|--|-------------------------|
| Provide employee the Employee Exit Survey link: hr.ufl.edu/exit | Treva Damron |
| Inform exiting employee about the Special Pay Plan: benefits.hr.ufl.edu/retirement/special-pay-plan/ | IFAS-FSC |
| Recommend employee to contact the UFHR Benefits and Retirement Office at benefits@ufl.edu for any benefits and/or retirement related inquiries | IFAS-FSC |

Prior to the Last Day of Employment

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|--|--------------|
| Provide information on W-2 statement mailing process: https://www.fa.ufl.edu/wp-content/uploads/2022/12/W2_Guidance_for_Former_Employees.pdf | IFAS-FSC |
| Provide information on leave cash out and timeline to receive amount due, if applicable | IFAS-FSC |
| Remind employee to cancel parking decal with https://taps.ufl.edu/ | Treva Damron |
| Notify of eligibility changes to employment education programs, if applicable (EEP, HEO) | IFAS-FSC |

Managing Logistics

The departing employee's email account is disabled automatically after termination unless the employee is a retiree, alumni, or current student. If the departing employee needs to keep the email address active, contact the identity coordinator in your department to provide them the appropriate affiliation to do so.

| Action | Completed if applicable |
|--|-----------------------------|
| Terminate or modify security access roles and affiliations to UF systems from departing department: myUFL, ERP systems, Network Managed by, departmental affiliation etc. | Michael Morrow |
| Work with your local IT support team for these items. Terminate or modify security access to computer systems: GatorLink account, service account(s), network drives, distribution lists, shared mailboxes etc. | Treva Damron |
| Terminate access to building(s) through the appropriate security system | N/A |
| Remove employee's name from authorized signature list(s), vehicle authorization records | Karri Bishop |
| Remove employee's name from office phone list, website, building directory, office mailbox, recurring Outlook meetings, Outlook calendars | Karri Bishop |
| Verify wireless reimbursement is stopped in myUFL (employee/supervisor) | <input type="checkbox"/> |
| Contact the PCard team to cancel PCard (supervisor) <ul style="list-style-type: none"> Email pcard@ufl.edu and include the cardholder's (employee's) name, UFID, and the reason for cancellation <i>Optional: Collect physical PCard from departing employee</i> | Supervisor/ Treva Damron |

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Collecting Items from Departing Employee

During an employee's tenure, he/she might have acquired university property. Be sure to collect these items prior to his/her departure.

| Action | Completed if applicable |
|--|--------------------------|
| Keys, PCard, and any other access cards (keys collected by Karri Bishop PCard collected by supervisor) | <input type="checkbox"/> |
| UF materials (uniforms, lab equipment, books, computers, clinical trials information, patient's notes, etc.) (supervisor) | <input type="checkbox"/> |

Requesting Vacation and Special Pay Information Cash Out

| Action | Completed if applicable |
|--|-------------------------|
| Verify travel advances, salary overpayments, cash advances and other debt owed including paid parental leave is repaid to UF <ul style="list-style-type: none">If, debt is owed, submit request for payment prior to completing leave cash out | IFAS-FSC |
| Submit appropriate leave cash out ePAF submitted promptly after termination (within two weeks of the termination date) | IFAS-FSC |

Completed by

| | |
|-------|--------|
| Name: | Title: |
|-------|--------|

On the Last Day of Employment

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Departing Employee Resources

As you transition from your employment at the University of Florida, we hope you find the following reminders and contact information useful.

Reminders

- Provide separation documentation prior to your departure
 - Documentation may include resignation/retirement letter/email
- Update your mailing address in <https://one.ufl.edu/> to ensure any official UF documentation concerning your departure is received
- Complete the Employee Exit Survey: <hr.ufl.edu/exit>
 - Survey results are completely anonymous
- Cancel your parking pass to avoid any additional charges
 - <https://taps.ufl.edu/permits/cancel/>
- Return any UF property in your possession
 - Keys, books, lab equipment, uniforms, computer, PCards, etc.

Important Contacts

| Office | Contact Information |
|---|--|
| Department HR Contact | Phone: Email: |
| Benefits & Retirement For questions regarding benefits including terminal leave options (special pay plan) and COBRA. | Phone: 352-392-2477 Email: benefits@ufl.edu |
| Employee Relations | Phone: 352-392-1072 Email: EmployeeRelations@hr.ufl.edu |
| Talent Acquisition & Onboarding For questions regarding other employment opportunities at UF. | Phone: 352-392-2477 Email: talent@hr.ufl.edu |
| Payroll & Tax Services | Phone: 352-392-1231 Email: payrollhelp@admin.ufl.edu |