



Faculty & Staff Separation Checklist

This checklist outlines employment exit procedures for:

- Regular, partial-year, and temporary faculty and staff (including student employees coded in LBCLR)
- Whose employment ends due to resignation, termination, retirement, or death

Employee name
First MI Last

Reason for separation Resignation Termination Transfer Death

Employee dept. _____
 Separation effective date _____

Check (✓) when complete or indicate N/A

Employee responsibilities

- Submit oral or written notice of termination to department. (Not required for temporary employees.)
- Notify Payroll to discontinue direct deposit ONLY if you will be closing your bank account, by sending an email to payroll@uga.edu. If you are not closing your bank account, no action is required on your part. After 6 months of inactivity, your direct deposit will be suspended until you provide an updated Request for Direct Deposit to the UGA Payroll department.
- Contact Employee Benefits at 706-542-2222 or http://www.hr.uga.edu for insurance continuation and retirement account information.
- If you worked in a temporary position covered by the Georgia Defined Contribution Plan (GDGP) and wish to obtain a refund of your contributions, complete and submit the GDGP refund form at <http://www.hr.uga.edu/benefits/bensumm/gdcp.html>
- Pay outstanding debts to appropriate campus units including parking violations, tuition expenses, health center fees, etc.
- Return all University Libraries' material and reconcile outstanding fines and fees; email maincirc@uga.edu or call 706-542-3256 to schedule an appointment to close your library account.
- Return parking permit to Parking Services for reconciliation and closing of parking account (parking@uga.edu or 706-542-7275)
- Return all University property to appropriate departmental personnel, e.g., keys; uniforms; cell phone; pager; laptop/ computer or audiovisual equipment; cameras; exhibits; handbooks; lab equipment; long distance authorization, purchasing, and UGA ID cards (retirees may keep UGA ID card after security deactivation, if applicable).
- Delete your contact information from the UGAAlert emergency notification system (<http://ugaalert.uga.edu/>)
- If you are actively conducting research in a UGA Laboratory, complete the procedure for closing a laboratory. Complete and sign the "Closing a Laboratory" checklist (<http://www.esd.uga.edu/chem/pub/closinglab.pdf>). Attach the "Closing a Laboratory" checklist to this checklist and give to your supervisor or other departmental representative prior to your last day at work.
- Complete, sign, and submit your final time sheet(s) and leave form(s) as applicable and submit to appropriate departmental personnel
- Provide new mailing address for W-2 purposes.
- Unsubscribe from all personal, professional, and UGA listservs. (Optional for retirees).
- Set voice mail pass code to your 5-digit campus phone number.
- Remove all personal items from your work space.
- Submit this completed checklist to your supervisor or departmental representative.
- For W-2 purposes, use the space below to provide new address information if your address will change.

Supervisor or departmental responsibilities

- Prior to the employee's last day of work, inventory the equipment s/he uses. Prepare necessary paperwork to transfer equipment to appropriate department or person.
- Notify International Education of termination of employment for J & H visa holders (706-542-7903).
- If the employee is actively conducting research in a UGA Laboratory, review the signed "Closing a Laboratory" checklist they have submitted (<http://www.esd.uga.edu/chem/pub/closinglab.pdf>). Fax a copy of the completed checklist to Environmental Safety at 706-542-0108. Attach the original checklist to this (exit) checklist and forward to Human Resources.
- Audit annual leave, compensatory time, sick leave balances; verify repayment of salary overpayments.
- Complete the UGA Separation Notice (http://www.busfin.uga.edu/forms/separation_notice.pdf) Department of Labor Form (DOL-800) as required by State law. (Note: The UGA Separation notice is **not** required for deceased employees or employees transferring to other UGA positions, but should be completed for all other non-student category employees.) Read instructions on form to clearly detail specific reason for termination. Give the original separation notice to the employee on his/her final work day. Forward a copy to Human Resources. Additional instructions are provided with the form. For non-renewal of employees on Board of Regents contracts, see Academic Affairs Policy Manual Section 1.06 (<http://www.uga.edu/provost/polproc/aapm/faculty/main.html>) or contact Faculty Records.
- If you are a Principal Investigator on an active sponsored agreement (contract, grant, cooperative agreement, etc.), notify the Office for Sponsored Programs at sponprog@uga.edu or by phone at 706-542-5939 prior to your last working day on the project.
- If the classified employee has not been evaluated in the past 12 calendar months, or if the employee's performance has changed substantially since the last evaluation, complete a final performance evaluation and provide a copy to the employee. (Optional for temporary employees.)
- Conduct an exit meeting with the terminating employee. (Optional for temporary employees.)
- Initiate the termination personnel report indicating new mailing address when applicable for W-2 purposes.
- If the employee has a departmental P-card, retrieve the card and call Procurement to cancel the employee's authorization.
- If employee has approval responsibilities within the E-Check or E-Travel systems, complete the approval path modification form (http://www.busfin.uga.edu/forms/approval_auth.pdf) to remove access.
- If the employee is leaving (not retiring from) UGA, please disable (not delete) his/her MyID by contacting the EITS Helpdesk. Retirees may keep and use their MyIDs, if desired.
- Terminate employee's access to University servers and systems including departmental distribution lists and listservs, email accounts, accounting, budget, and payroll/personnel systems, etc.
- Remove terminating employee's name from authorized signature lists, including payroll distribution, payroll voucher, checking accounts, various security rosters, etc.
- Copies of the employee's performance evaluations should be maintained in departmental personnel files. Such files should be retained in the department according to BOR record retention policies (http://www.usg.edu/records_management/schedules/classified_employees_personnel_records) after the employee terminates UGA employment.
- Other: _____

Comments:

Employee signature

Date

Supervisor/departmental representative signature

Date

**Use this form to ensure compliance with appropriate procedures.
Retain signed original in departmental files, if desired.**