Retain this completed form in departmental files, if desired.

The University of Georgia

Faculty & Staff Separation Checklist

Clear form

This checklist outlines employment exit procedures for:

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

Employee name _____ First _____ MI _____ Last

Reason for separation
- ☐ Resignation
- ☐ Termination
- ☐ Retirement
- ☐ Death

Employee dept. _____

Separation effective date _____

Print form

Check (✔) when complete or indicate N/A

Employee responsibilities

- ☐ 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 and participated in the Georgia Defined Contribution Plan (GDCP) and desire to apply for a refund of your contributions, visit the ERSGA web site (http://www.ers.ga.gov/plans/gdcp/gdcpmain.html)
- ☐ If you have a P-Card, notify your Approving Official, Department Head, and a P-Card Administrator in Procurement in writing and turn in the P-Card to one of these individuals.
- ☐ 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).
- ☐ BE AWARE: Employees who separate from UGA lose access to their UGA email accounts within a matter of days of their separation. (Retirees can keep their UGA email addresses if they notify EITS prior to their retirement dates.)
- ☐ If you are a principal investigator on an active sponsored agreement (contract, grant, cooperative agreement, etc.), notify the Award Negotiation member of your Sponsored Projects Administration Team which can be found here: http://research.uga.edu/spa/find-sponsored-projects-team/ prior to your last working day on the project.
- ☐ 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: http://research.uga.edu/safety/chemical-laboratory/opening-closing-lab/)
- ☐ 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 2580#.
- ☐ 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.

_____
Complete mailing address

Complete page 2 of this form

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.
- [ ] Initiate the termination personnel report no later than the employee's last working day, indicating new mailing address (when applicable) for W-2 purposes.
- [ ] 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. 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 (ttp://provost.uga.edu/index.php/policies/academic-affairs-policy-manual/1-06-5-notice-of-resignation-and-employment) or contact Faculty Affairs.
- [ ] Terminate employee's access to University servers and systems including departmental distribution lists and listservs, email accounts, accounting, budget, and payroll/personnel systems, etc.
- [ ] Collect the ArchPass token from the employee and return it to the EITS Helpdesk. Send an email to the EITS Helpdesk (helpdesk@uga.edu) with the MyID of the employee.
- [ ] Remove terminating employee's name from authorized signature lists, including payroll distribution, checking accounts, various security rosters, etc.
- [ ] Audit annual leave, compensatory time, sick leave balances; verify repayment of salary overpayments.
- [ ] If paying out annual leave, be sure to clear the annual leave from the eLeave system.
- [ ] If the employee has a P-Card, confirm that (1) the P-Card has been cancelled, cut, and the pieces returned to a P-Card Administrator in Procurement, (2) all transactions have been signed off in Works, and (3) adequate documentation exists for each transaction before the employee's separation of service date.
- [ ] 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.
- [ ] 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, complete the procedure for closing a laboratory: http://research.uga.edu/safety/chemical-laboratory/opening-closing-lab/
- [ ] 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 _____

Retain this completed form in departmental files, if desired.
(Do not send to HR)