

Retain this completed form in departmental files, if desired



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 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 _____

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 (GDGP) and desire to apply for a refund of your contributions, visit the ERSGA web site (<https://www.ers.ga.gov/georgia-defined-contribution-plan>)
- 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: <https://spa.uga.edu/find-spa-representative/> 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.

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 (<http://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, DOL separation notice, and termination letters should be maintained in departmental personnel files. Such files should be retained in the department according to BOR record retention policies (https://www.usg.edu/records_management/schedules/) after the employee terminates UGA employment.
- Other: _____

Comments:

Employee signature

Date

Departmental representative signature

Date

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(Do not send to HR)