UNIVERSITY OF GEORGIA

Faculty & Staff Separation Checklist

This checklist outlines employment exit procedures for:

Regular, partial-year, and temporary faculty and staff 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

- [ ] Contact OneUSG Connect Benefits at 1-844-587-4236 for information on insurance continuation. Contact UGA Benefits at 706-542-2222 for questions about rollover or withdrawal of retirement funds or login to your Retirement at Work account.

- [ ] 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 www.ers.ga.gov/georgia-defined-contribution-plan

- [ ] If you have a P-Card, notify (in writing) your Approving Official(s), Department Head, and the P-Card Coordinators in Procurement and turn in the P-Card to one of these individuals who is responsible destroying the card.

- [ ] 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; purchasing, and UGA ID cards (retirees may keep UGA ID card after security deactivation, pif applicable).

- [ ] BE AWARE: Employees who separate from UGA lose access to their UGA accounts (MyID and Email) within a matter of days of their separation. Retirees may keep their UGA MyID and email addresses if they have OneUSG Connect retirement dates. Some faculty maintain accounts for up to 12 months beyond their termination date. Departments who want to ensure that the faculty accounts are disabled at termination will need to contact HR or Office of Faculty Affairs to start the faculty access removal exemption process. Direct questions regarding access to EITS at helpdesk@uga.edu.

- [ ] 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: spa.uga.edu/find-spa-representative/ prior to your last working day on the project.

- [ ] If you are actively conducting research in a UGA Laboratory, complete the procedure for closing a laboratory: research.uga.edu/safety/chemical-laboratory/opening-closing-lab/

- [ ] Delete your contact information from the UGAAlert emergency notification system (ugaalert.uga.edu/)

- [ ] Complete and submit your final time sheet(s) and leave form(s) as applicable in OneUSG Connect.

- [ ] Go to OneUSG Connect and confirm your mailing address for W-2 purposes. Go to the OneSource training library at training.onesource.uga.edu/UPK_Training/OneSourceOL/Publishing%20Content/PlayerPackage/data/toc.html If your W-2 is set for electronic delivery and you leave UGA by employment termination or retirement, you will lose access to your W-2 through the website. Before leaving UGA, go to OneUSG Connect Employee Self-Service and remove your consent for electronic W-2 delivery. If you do not take this action, you will have to contact OneUSG Connect Support to have your W-2 mailed to you.

- [ ] Unsubscribe from all personal, professional, and UGA listservs by going to listserv.uga.edu. This step is optional for retirees.

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.

☐ Enter the employee's termination effective date via Manager Self Service in OneUSG Connect. Training is available in the OneSource training library at training.onesource.uga.edu.

☐ Terminate employee's access to University servers and systems including departmental distribution lists and listservs, e-mail accounts, HR, financial, and departmental systems, etc. Please note: Retirees may keep their UGA MyID and email addresses if they have OneUSG Connect retirement dates. Some faculty maintain accounts for up to 12 months beyond their termination date. Departments who want to ensure that the faculty accounts are disabled at termination will need to contact HR or Office of Faculty Affairs to start the faculty access removal exemption process. Direct questions regarding access to EITS at helpdesk@uga.edu.

☐ Audit annual leave, compensatory time, and sick leave balances. If there is an error with the balance(s) listed e-mail, oneusgsupport@uga.edu.

☐ If the employee accrued compensatory time, pay out any compensatory time due to the employee. To determine the number of hours to be paid follow the training tutorial at training.onesource.uga.edu. To process the compensatory hours for payment, follow the training tutorial linked here. Annual leave pay outs will be processed centrally on the pay cycle following the employee's final paycheck. No action is needed from the department.

☐ Verify repayment of salary over payments.

☐ If the employee has a P-Card, confirm with the P-Card Coordinators in Procurement that (1) the P-Card has been canceled, (2) that the card has been destroyed, (3) all transactions have been signed off in Works, and (4) adequate documentation exists for each transaction before the employee's separation date.

☐ Notify Immigration Services at UGA of termination of employment for or any person holding a non-immigrant visa (J-1, H-1B, O-1) (706-542-2900).

☐ If the employee is actively conducting research in a UGA Laboratory, complete the procedure for closing a laboratory: research.uga.edu/safety/chemical-laboratory/opening-closing-lab/

☐ Copies of the employee's performance evaluations and termination letters should be maintained in departmental personnel files. Such files should be retained in the department according to BOR record retention policies (www.usg.edu/records_management/schedules/) after the employee terminates UGA employment.

☐ Contact the departmental telephone representative submit a ticket to change the telephone voice mail code to a default passcode. The Telephone Incident/Repair Ticket should be submitted to uga.teamdynamix.com/TDClient/Requests/ServiceDet?ID=16396

☐ Other: _____

Comments:

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_____   _____
Employee signature   Date

_____   _____
Departmental representative signature   Date

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