Human Resources Guideline for Exiting Employees and Supervisors

Purpose

It is the intention of the Human Resources Department to ensure employee separations are handled and facilitated in a professional manner with minimal disruption to the campus community.

Procedures

1. When resigning from University employment, employees should provide a letter of resignation to their appropriate supervisor. Employees are requested to provide as much notice as possible and should include their expected last day of actual work. The letter of resignation may be submitted electronically and should include the specific reason for resigning.
   - The last day of employment must be an actual day of work. Accrued leave may not be used as the notice period.
2. The supervisor should accept the resignation of an employee in writing and clearly indicate that he/she accepts the resignation indicating the approved last day worked and specific reason for leaving.
3. The supervisor must then send the resignation letter and supervisory acceptance notification to Human Resources (Records area) to begin the HR separation process.
4. The resigning employee and supervisor will receive written confirmation from HR, which includes an Employee Exit Checklist and a Supervisor Exit Checklist detailing the separation clearance tasks and the applicable deadline.
5. HR will also notify the “Separation Clearance” group of the employee’s separation date to assist the employee and supervisor in obtaining clearance. Examples of outstanding obligations include property (parking passes, I.D. cards, keys, tangible and attractive property, Library materials, etc.), outstanding financial obligations (parking fines, tuition balances, Foundation loans, Grant-In Aid commitments, etc.) and termination of network and other electronic and data access.
6. During the transition period (notice period) the supervisor and employee should coordinate any work in progress to assure the least amount of disruption as possible for the department and campus community.
7. Employees are expected to return all University property in their possession and settle their financial accounts in advance of the last day worked.
8. The employee’s immediate supervisor is responsible for ensuring proper separation procedures are followed and for notifying the Department Head if property or keys are not returned or accounts are not settled.

9. In accordance with Regulation FGCU_PR 5.023, the Department Head shall work in collaboration with the Department of Human Resources and Payroll (in advance of the employee’s last day worked) or Accounts Receivable (after the employee has already separated) to activate the appropriate measures to deduct any amounts owed to the University or to deduct an amount to compensate for unreturned property from any funds which may be due the employee.

10. Human Resources will provide the employee specific information as it relates to:
   - Final paycheck date
   - Payment of Unused Annual Leave, Overtime/Special Comp and/or Sick Leave, if applicable
   - Benefits End Date
     - All state sponsored insurance benefits will end on the last day of the month following the separation date (last actual day of work)
   - Retirement Information
   - Final Financial Disclosure
   - Change of Address Instructions
   - Sick Leave Pool Donations

11. If the employee is transferring to another State of Florida agency that accepts leave balance transfers, the employee must contact the Human Resources Office at 239-590-1400. The future agency should send a written request for the leave balance information within two weeks of the separation date. If this does not happen within a timely manner, the leave balances are paid to the employee according to policy. It is the employee’s responsibility to make sure this communication occurs.

12. Employees are invited to complete an Exit Interview. Requests for an individual exit interview can be made by contacting Human Resources office at 239-590-1400.

13. Separated employees must continue to notify the Human Resources Office with any address changes for the remainder of the calendar year so that W-2 may be forwarded as appropriate.
EMPLOYEE SEPARATION CHECKLIST

When an employee leaves the University, there are a number of things that need to be done to cleanly end the relationship. The following items assist with the administrative requirements in relation to separating employees.

PERSONAL

☐ Remove personal items from work areas.
☐ HR will contact you regarding termination/continuation of applicable benefit programs.
☐ If relocating, provide new address to HR.
☐ Retrieve any personal files/information on your office/home PC.
☐ If you would like to complete an exit survey, the questionnaire can be found at https://fgcumarcomm.formstack.com/forms/exit_interview. If you would like an individual exit interview, please contact Human Resources at 239-590-1400 or hresources@fgcu.edu.
☐ If you have accepted a position with another State of Florida agency that accepts leave balance transfers, please contact the Human Resources Office at 239-590-1400 or hr@fgcu.edu. Please note: The future employer should send a request in writing for the leave balance information directly to the Human Resources Office within two weeks of the separation date. It is the employee’s responsibility to make sure this is communicated between the two employers.

RETURN ALL UNIVERSITY PROPERTY

☐ Keys (building, office, desk, files, vehicles, lockers, etc.)
☐ Parking tag.
☐ Computers/laptops and other peripheral equipment (e.g., printers, cameras, etc.).
☐ Cellular phones/pagers.
☐ Records (documents, files, correspondence, etc. not maintained in your office or your computer).
☐ P-card.
☐ Petty cash fund.
☐ Library books, CD/DVDs, periodicals.
☐ ID/access cards.
☐ Uniforms/gear/tools/instruments/job accessories.

FINANCIAL

Settle outstanding accounts, including:

☐ Charges owed to your department.
☐ Charges owed to other departments (e.g., Library, Parking, Student Accounts, Foundation loan, Grant-In-Aid commitments).
☐ Reimbursements owed to you (e.g., travel expenses).

MISCELLANEOUS

☐ Inform your supervisor of any email or other distribution lists your name should be removed from as well as any authorized signature/internal authority lists.
☐ Change voicemail greetings and email automatic replies.
☐ Identify any subscriptions and/or memberships in professional organizations.
☐ Return completed checklist to supervisor.

Updated: January 31, 2018
When an employee leaves the University, there are a number of things that must be done to cleanly end the relationship. Regulation FGCU-PR5.023 Separation states that the supervisor is responsible for ensuring proper separation procedures. The following items assist with the administrative requirements in relation to separating employees.

**SEPARATION PROCESSING**

- Confirm final paid leave usage for support staff.
- Confirm all time off has been approved and entered.
- Notify BTS of employee’s separation.
- Notify third party vendors or agencies where the employee may have physical or electronic access to property or data.
- Update any departmental email distribution or authorized signature lists.
- Remind employee to change voicemail covers and email replies.

**EQUIPMENT/PROPERTY**

- Arrange for return of University property:
  - Keys (building, office, desk, files, vehicles, lockers, etc.).
  - Parking tag.
  - Computers/laptops and other peripheral equipment (e.g., printers, cameras, etc.).
  - Cellular phones/pagers.
  - Records (documents, files, correspondence, etc. not maintained in your office or your computer).
  - P-card.
  - Petty cash fund.
  - Library books, CD/DVDs, periodicals.
  - ID/access cards.
  - Uniforms/gear/tools/instruments/job accessories.
- Cancel/change any memberships and/or subscriptions.
- Obtain any University records that may be in the employee’s possession.
- Determine applicable equipment reassignment (e.g., computers, etc.).

**FINANCIAL**

- Facilitate clearance team items, for example, outstanding library fees, parking fines, Foundation loans, Grant-In-Aid commitments, etc.
- Confirm outstanding P-card transactions with employee and Office Manager.
- Facilitate return of any reimbursements to employee.

**MISCELLANEOUS**

- Make arrangements for transition of work.
- Ensure employee arranges for removal of personal items.
- Obtain completed Employee Separation Checklist and retain for your files.