This form is designed to assist you with a more condensed and efficient process for employees who are not separating with the university but rather transferring to another unit. Pages 1-4 are to be completed by departmental HR and/or the supervisor while page 5 is a resource page for the transferring employee.

If an employee is separating from the university, then please see the [Exit Checklist: Separation](https://hr.ufl.edu/wp-content/uploads/2021/05/exit-checklist_separation.docx) for a more comprehensive list of tasks that should be completed prior to separation.

**Note:** The separation checklist should also be used for those who may be transitioning from a position number (TEAMS, Faculty, USPS, etc.) into a non-position numbered appointment (OPS, Courtesy Faculty, etc.) as that form is more comprehensive.

Completed by Departmental HR & Supervisor

Who is Transferring?

**Initiating the Process**

|  |
| --- |
| Name: |
| UFID: | Date of Hire: |
| Department: | Date of Transfer: |

Reason for Transfer

Provide reason for transfer below (i.e., promotion, end of temporary assignment, etc.)

|  |
| --- |
|  |

Making Changes in myUFL

Changes in myUFL for transferring employees are limited as the hiring department should transfer the current record over.

Please refrain from terminating an employee if they will remain active with another unit as this may **negatively impact** their benefits, and other areas.

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Collect any documentation (i.e., resignation letter/email, etc.) |[ ]
| Process any non-reimbursed travel expenses through the department prior to transfer date |[ ]

Sponsored Research Actions

**Prior to the Last Day Before Transfer**

If the transferring employee had sponsored research responsibilities, please complete the following tasks.

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Notify Sponsored Research if the transferring employee is a faculty member on a grant at <https://research.ufl.edu/forms/notification-of-departing-pi.html>  |[ ]
| Verify any outstanding reports pending for Sponsored Research are submitted  |[ ]
| Verify disclosures of inventions and copyrights are submitted |[ ]
| Ensure lab supplies/chemical/hazardous material/work in process are identified and inventoried |[ ]
| If lab space was used, lab space must be “closed out” through Environmental Health and Safety |[ ]

Notify Transferring Employee

When an employee transitions from their current unit, it is important to capture feedback on their experience and to inform them on the following items.

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Provide employee the Employee Exit Survey link: [hr.ufl.edu/exit](https://hr.ufl.edu/exit/)  |[ ]
| Remind employee to cancel parking decal with <https://taps.ufl.edu/>  |[ ]
| Provide information on leave cash out and timeline to receive amount due, if applicable |[ ]
| Inform exiting employee about the Special Pay Plan (if applicable): [benefits.hr.ufl.edu/retirement/special-pay-plan/](https://benefits.hr.ufl.edu/retirement/special-pay-plan/) |[ ]
| Notify of eligibility changes to employment education programs, if applicable (EEP, HEO) |[ ]
| Advise employee to contact the UFHR Benefits and Retirement Office at benefits@ufl.edu for any benefits and/or retirement related inquiries |[ ]

Managing Logistics

**On the Last Day Before Transfer**

|  |  |
| --- | --- |
| Action | Completed if applicable |
|  Terminate or modify security access roles and affiliations to UF systems from departing department: myUFL, ERP systems, Network Managed by, departmental affiliation etc. |[ ]
|  Work with your local IT support team for these items. Terminate or modify security access to computer systems: GatorLink account, service account(s), network drives, distribution lists, shared mailboxes etc. |[ ]
|  Confirm departmental SharePoint site owner(s) have removed/updated ownership for all local SharePoint sites for the departing employee. |[ ]
|  Confirm departmental Teams site owner(s) have removed/updated ownership for all local Teams sites for the departing employee.  |[ ]
|  Terminate access to building(s) through the appropriate security system |[ ]
|  Remove employee’s name from authorized signature list(s), vehicle authorization records |[ ]
|  Remove employee’s name from office phone list, website, building directory, office mailbox, recurring Outlook meetings, Outlook calendars |[ ]
|  Verify wireless reimbursement is stopped in myUFL |[ ]
|  Contact the PCard team to cancel PCard * Email pcard@ufl.edu and include the cardholder’s (employee’s) name, UFID, and the reason for cancellation

 *Optional: Collect physical PCard from departing employee* |[ ]

Collecting Items from Transferring Employee

**On the Last Day Before Transfer**

During an employee’s tenure, they might have acquired university property. It is extremely important to collect these items prior transfer.

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Keys, PCard, and any other access cards |[ ]
| UF property (uniforms, lab equipment, books, computers, clinical trials information, patient’s notes, etc.) |[ ]

Requesting Vacation and Special Pay Information Cash Out

|  |  |
| --- | --- |
| Action | Completed if applicable |
| Verify travel advances, salary overpayments, cash advances and other debt owed including paid parental leave is repaid to UF * If, debt is owed, submit request for payment prior to completing leave cash out, if applicable
 |[ ]
| Submit appropriate leave cash out ePAF submitted promptly after transfer (within two weeks of transfer date), if applicable |[ ]

**Completed by**

|  |  |
| --- | --- |
| Name: | Title: |

Transferring Employee Resources

As you transition to another unit with the university, we hope you find the following reminders and contact information useful.

Reminders

* Provide transfer documentation prior to your transition
	+ Documentation may include resignation letter/email informing department of decision to leave current appointment
* Provide feedback on experience by completing the Employee Exit Survey
	+ Survey: [hr.ufl.edu/exit](http://hr.ufl.edu/exit)
	+ Feedback is completely anonymous
* Cancel your parking pass to avoid any additional charges, if applicable
	+ <https://taps.ufl.edu/permits/cancel/>
* Return any UF property in your possession
	+ Keys, books, lab equipment, uniforms, computer, PCards, etc.

Important Contacts

|  |  |
| --- | --- |
| Office | Contact Information |
| Department HR Contact | Phone:Email: |
| Benefits & RetirementFor questions regarding benefits including terminal leave options (special pay plan) and COBRA. | Phone: 352-392-2477Email: benefits@ufl.edu  |
| Employee Relations  | Phone: 352-392-1072Email: EmployeeRelations@hr.ufl.edu  |
| Talent Acquisition & OnboardingFor questions regarding other employment opportunities at UF. | Phone: 352-392-2477Email: talent@hr.ufl.edu |
| Payroll & Tax Services | Phone: 352-392-1231Email: payrollhelp@admin.ufl.edu  |