

## EMPLOYEE EXIT CHECKLIST

### Employee Responsibilities

The purpose of this checklist is to assist F&S employees with the process when an employee leaves the university. Employees leaving the university should be aware of pertinent information, rights and benefits that may affect them.

**Note:** Failure to provide at least two (2) weeks written notice of resignation may result in the employee being designated as ineligible for rehire, except in cases of medical or family emergency, or where the employee's early departure is approved by the university. It is expected that employees will work on their last day of employment.

Employee's Name (please print)	Employee ID	Department Name
<input type="checkbox"/> A&P <input type="checkbox"/> USPS <input type="checkbox"/> OPS	_____ Termination Date	Eligible for rehire? ___ YES ___ NO

- Schedule exit interview with supervisor/manager and F&S HR.
- Submit exit interview questionnaire in the sealed envelope marked confidential to F&S Human Resources during the exit interview.
- Contact Parking Services and settle outstanding permit fees or fines. Eligible for retirement: \_\_\_\_\_
- Contact the Computer Store and settle outstanding payment plans
- Contact Health Services and settle outstanding payments.
- Contact the Library, settle outstanding fines, and return library books.
- Off-campus self-service will be available after end of employment. For employee self-service (i.e. pay advices and current and past W-2s), refer to: <http://my.ucf.edu>.
- If you have consented to receive your W-2 through Employee Self Service, you can verify your access to your W-2 by signing into <http://my.ucf.edu>. After logging in, click Employee Self Service, Payroll and Compensation, W-2/W-2c Forms. Ensure a valid email address is listed for W-2 notification. If you have not consented, ensure your address is accurate through Employee Self Service.
- Leave Transfers to accepting employers: Contact [payroll@ucf.edu](mailto:payroll@ucf.edu) to indicate a desire to transfer leave balances to an accepting employer **prior to the termination date**. The future employer should send an official note requesting leave balance information directly to Human Resources within 2 weeks of the termination date.

Remaining leave balances as of: \_\_\_\_\_ Hourly Rate: \_\_\_\_\_

Annual Leave: \_\_\_\_\_ Sick Leave: \_\_\_\_\_ (1/4 paid out if employed 10+ years) 1/4 = \_\_\_\_\_

Overtime Comp.: \_\_\_\_\_ Special Comp.: \_\_\_\_\_

Total Hours: \_\_\_\_\_ Average payout before taxes: \_\_\_\_\_

Approximate payout date: \_\_\_\_\_

*Please contact Traci Evison 407-823-5187 or Tania Gutierrez-Catasus 407-823-6406 for questions about benefits.*

**General Information:**

If desired, an appointment may be made with a Benefits team member (contact information above) for the following:

- Obtain information regarding insurance coverage/COBRA benefits. Employees that are enrolled in health, dental or vision insurance at the time of termination are eligible for COBRA coverage. Since premiums are paid a month in advance, the employee may still have coverage through the month following termination. Once the termination is completed in PeopleSoft and sent to People First, COBRA information will be sent to the home address the employee has on file with the University. To obtain COBRA coverage, the employee must complete the appropriate paperwork and return it to People First within the specified time frame.
- Obtain information regarding retirement and/or supplemental retirement accounts (FICA Alternative/403b's/457's).
- Special Pay Plan: Leave Balances for employees who are 55 years and older and who will receive a leave payout of \$10,000 or greater will be deferred to a 401(a) account administered by TIAA-CREF.
- Conversion policies are available for the following plans:
  - State Basic Life and Optional Life Insurance through Minnesota Life
  - Life Insurance Policies through The Gabor Agency
  - Disability Coverage or Personal Accident Coverage through Colonial Life & Accident Insurance Company
  - Cancer Policies through AFLAC and/or
  - Supplemental Hospital Plans through ALTA and/or The Gabor Agency
  - Long Term Care through The Gabor Agency
  - Medical Flexible Spending Account Retirement

**Retirement**

- FRS Pension Plan: no action required
- FRS Investment Plan: No action required. Employee will continue to receive annual statements. If employee has an address change or for any other changes after termination of employment, contact Ernst and Young at 1-866-446-9377.
- Optional Retirement Program: No action required. Employee will continue to receive statements. If employee has an address change or for any other changes after termination of employment, contact the appropriate provider company.

Employee Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_