

EMPLOYEE OFFBOARDING GUIDE



THE UCF EMPLOYEE OFFBOARDING GUIDE

Offboarding describes the separation process when an employee leaves the university, whether through resignation, retirement, or termination. The employee, supervisor and departmental HR representative all play key roles in the process. This guide provides information to ensure a smooth transition for employees upon separation of employment. Utilizing this guide as soon as notice is given will ease the transition for both the employee and the department. There are separate [Retiree Guides](#) found on the UCF HR Retirement website that include information applicable to employees who are retiring from UCF.

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Action Item Checklist

- ☐ If you are planning to retire, contact a benefits coordinator at least 60 days before your retirement date and refer to the applicable [retiree guide](#).
- ☐ Provide supervisor with at least a two-week notice of separation of employment. Failure to provide at least two weeks' written notice of resignation may result in being designated as ineligible for rehire, except in cases of a medical or family emergency, or where the employee's early departure is approved by the university.
- ☐ **In-unit Faculty are required to provide at least 30 days written notice of separation of employment. Additional information can be referenced within the [United Faculty of Florida Collective Bargaining Agreement](#).*
- ☐ Return keys, uniform(s), proximity card, P-Card or Voyager Gas Card and all other UCF property to your department.
- ☐ Set outgoing message on UCF email. If applicable, update the ownership of the departmental OID account to a remaining team member(s).
- ☐ Return library books and settle outstanding fines.
- ☐ Contact [Parking Services](#) to settle outstanding permit fees and/or fines.
- ☐ Contact the [Technology Product Center](#) (computer store) to settle any outstanding payment plans.
 - Address
 - Personal Email Address
 - Phone Number
 - Banking Information
- ☐ Review W-2 consent in the [UCF Workday](#) system.
- ☐ Please contact your HR Business Center to schedule an exit survey. Alternatively, you can access the [UCF Employee Exit Survey online](#). The survey should take about ten minutes to complete.
- ☐ If desired, request an exit interview with the department head or designee.
- ☐ If you are currently enrolled in insurance plans decide if you would like to continue your current health, vision and/or dental coverage through COBRA or your health insurance benefits through Eligible Former Employee (EFE) coverage. Additional information can be referenced on the [MyBenefits website](#).
- ☐ Contact your retirement plan provider(s) if you wish to request a distribution or rollover of your retirement account(s). Local representative contact information can be found on the [HR website](#).
- ☐ Complete the [Employee Exit Checklist](#).

Insurance Continuation Options

Upon separation, the insurance plans offered through the Division of State Group Insurance (DSGI) and Gabor Financial Solutions may offer plan continuation options. Helpful details and contact information can be found below but any additional questions, you may contact the UCF HR Benefits Section at Benefits@ucf.edu or 407-823-2771.

Health (includes prescription), Dental & Vision

- **When Coverage Ends:** The last day of the month following separation effective date.
 - 9-month faculty may have an extend coverage end date.
- **Continuation Option:** Yes, option of continuing coverage for up to 18 months.
- **Contact Information:** People First at 1-866-663-4735. Specific provider contact information can be found on the [MyBenefits website](#).
- **Additional Information:** A COBRA package will be sent to your mailing address on file within two weeks following separation.

Eligible Former Employee (EFE) Health Benefits

- **Continuation Option:** Former full-time salaried state employees who were enrolled in the State Group Insurance Program at the time of their separation, are eligible to continue state health insurance coverage after separation. Must make an election within twenty-four (24) months of separation and can continue coverage indefinitely.
- **Contact Information:** People First at 1-866-663-4735.
- **Additional Information:** EFEs will receive a benefit statement in addition to the regular COBRA packet upon separation. More information can be found on the [MyBenefits website](#).

Basic & Optional Life

- **When Coverage Ends:** The last day of the month following separation effective date.
- **Continuation Option:** This policy does not continue after separation.
- **Contact Information:** Securian Financial at 1-888-826-2756.
- **Additional Information:** If you are interested in converting your group policy into a personal policy, contact Securian Financial.

Flexible Spending Account (FSA)

- **When Coverage Ends:** Terminates on last day of work.
- **Continuation Option:** Yes, must contact People First for FSA continuation.
- **Contact Information:** People First at 1-866-663-4735; Chard Snyder 855-824-9284.
- **Additional Information:** You must submit all applicable claims by April 30 of the next plan year. Review the [FSA FAQs](#) for more information. Note: UCF does not permit employees to have FSA balance paid from leave accrual payout as indicated by one of the options on the [FSA Options When Employment Ends Form](#).

Health Savings Account (HSA)

- **When Coverage Ends:** No end date; account remains open.
- **Continuation Option:** None
- **Contact Information:** People First at 1-866-663-4735; Chard Snyder 855-824-9284.
- **Additional Information:** A monthly \$4 administrative fee will be applied upon separation. Review the [HSA FAQs](#) for more information.

Supplemental Cancer, Hospitalization & Disability

- **When Coverage Ends:** The last day of the month following separation effective date.
- **Continuation Option:** These policies do not continue after coverage end date.
- **Contact Information:** Specific provider contact information can be found on the [MyBenefits website](#).
- **Additional Information:** If you are interested in converting to a personal policy and setting up direct pay with the provider, contact the provider for additional information.

Gabor Life Insurance

- **When Coverage Ends:** The end of the month in which separation occurred.
- **Continuation Option:** Portable coverage.
- **Contact Information:** Gabor Financial Solutions 800-330-6115.
- **Additional Information:** Certain terms and conditions apply. Contact Gabor representative for [additional information](#).



Gabor Disability Plan(s)

- **When Coverage Ends:** The end of the month in which separation of employment occurred.
- **Continuation Option:** Non-portable coverage.
- **Contact Information:** Gabor Financial Solutions at 800-330-6115.
- **Additional Information:** Discontinued when an employee separates from employment. Contact Gabor representative for additional information.

Employee Assistance Program (EAP)

- **When Coverage Ends:** Separated employees will have access to EAP benefits for 30 calendar days post separation.
- **Continuation Option:** None.
- **Contact Information:** Health Advocate at 877-240-6863.
- **Additional Information:** Separated employees who had previously been approved or referred for specialized care or treatment, will be able to start new sessions within 30 days of separation and will be able to complete all previously opened session(s).



Retirement Plans

FICA Replacement Plan

The [UCF 401\(a\) FICA Replacement Plan](#), formerly known as the FICA Alternative plan, is a defined contribution plan. Under the plan, employees contribute 7.5% of their compensation on a pre-tax basis to an account in their name in lieu of paying social security taxes.

- **Vesting Period:** Immediate, enrollment in the plan is mandatory and automatic for all OPS non-students, Physician Learners, Post-Doctoral Associates and Adjunct Faculty.
- **Eligible for Distribution:** Yes, if no longer employed in any capacity with UCF.
- **Contact Information:** TIAA at 1-800-842-2776
- **Additional Information:** While actively employed in any position with UCF, employees may not access this plan for distributions or rollovers. A quarterly fee of \$6.25 (\$25/year) is applied if account has balance and remains open.

Florida Retirement System (FRS) Pension Plan

The [FRS Pension Plan](#) is a defined benefit plan, in which you are guaranteed a benefit at retirement if you meet certain criteria. The amount of your future benefit is determined by a formula, based on your earnings, length of service, and membership class, and may be adjusted by a cost-of-living increase each July (adjustment only applicable for FRS service earned prior to July 1, 2011).

- **Vesting Period:** If hired prior to 7/01/2011 the vesting period is 6 years and if hired after 7/01/2011 the vesting period is 8 years.
- **Eligible for Distribution:** Yes, if vested.
- **Contact Information:** FRS Guidance Line 866-446-9377.
- **Additional Information:** Under the Pension Plan, if you leave FRS-covered employment and go to a non-FRS employer, your Pension Plan benefit is frozen until you return at a later date to continue your FRS-covered employment or begin receiving your early or normal retirement benefit. If distribution occurs, you will be subject to [FRS Reemployment Limitations](#). Vested members of the Pension plan are eligible for the monthly [Health Insurance Subsidy \(HIS\)](#) payments.



Florida Retirement System (FRS) Investment Plan

The [FRS Investment Plan](#) is a defined contribution plan, in which the plan is funded by employer and employee contributions that are based on your salary and your FRS membership class. The contributions are allocated among various investment funds, and the retirement benefit is the value of your account at termination. There is no fixed benefit level at retirement.

- **Vesting Period:** 1 year of creditable service.
- **Eligible for Distribution:** Yes, if vested.
- **Contact Information:** FRS Guidance Line 866-446-9377.
- **Additional Information:** If distribution or rollover occurs, you will be subject to [FRS Reemployment Limitations](#). There may be tax penalties if you access funds prior to age 59½. For more information review the FRS Investment Plan [Summary Plan Description](#).

State University Optional Retirement Program (SUSORP/ORP Plan)

The [SUSORP Plan](#), also known as the ORP plan, is a defined contribution plan, in which the plan is funded by employer and employee contributions that are based on an employee's salary and membership class. The State contracts with four [Investment Provider Companies](#) to offer a variety of mutual funds and annuities to university personnel.

- **Vesting Period:** Immediate
- **Eligible for Distribution:** Yes
- **Contact Information:** Local ORP provider representatives contact information can be found on the [HR website](#).
- **Additional Information:** If distribution or rollover occurs, you will be subject to [FRS Reemployment Limitations](#). There may be tax penalties if you access funds prior to age 59½.

Voluntary UCF 403(b) Plan

This plan offers an opportunity for employees to save additional money from their paychecks on a pre-tax and after-tax (ROTH) basis. The plan is available to all employees and employees under age 50 may contribute up to the IRS limit of \$23.5k. For employees ages 50-59 and 64 or older, IRS limit is \$31k. Employees attaining age 60-63 in 2025 the IRS limit is \$34,750. There are no employer contributions. Voluntary SUSORP contributions count towards 403(b) limit.

- **Vesting Period:** Immediate
- **Eligible for Distribution:** Yes
- **Contact Information:** Local representative contact information can be found on the [HR website](#).
- **Additional Information:** Account balances that do not exceed \$5k may be subject to cash out as a lump sum following employment separation. The IRS requires that distributions under a 403(b) plan begin no later than the April 1 of the calendar year following the calendar year in which you attain age 73 or separate from service, whichever occurs later. Contact provider for distribution or rollover. There may be tax penalties if you access funds prior to age 59½.

Voluntary 457(b) Deferred Compensation Plan

The [Florida Deferred Compensation Plan](#) is separate from the FRS, ORP and voluntary 403b plans. The plan is available to all employees and employees under age 50 may contribute up to the IRS limit of \$23.5k. For employees ages 50-59 and 64 or older, IRS limit is \$31k. Employees attaining age 60-63 in 2025 the IRS limit is \$34,750. There are no employer contributions. There are no employer contributions.

- **Vesting Period:** Immediate
- **Eligible for Distribution:** Yes, 30 days after separation.
- **Contact Information:** Local 457(b) provider representative contact information can be found on the [HR website](#) and employees can contact the Bureau of Deferred Compensation at 1-877-299-8002.
- **Additional Information:** The IRS requires that distributions under a 457(b) plan begin no later than the April 1 of the calendar year following the calendar year in which you attain age 73 or separate from service, whichever occurs later. Contact provider for distribution or rollover. There may be tax penalties if you access funds prior to age 59½.



Accrued Leave Payout

Leave payouts are processed on the second pay date following the last paycheck the employee received for regular wages. This allows the department sufficient time to verify that no overpayment has occurred, that all leave balances are accurate, and that all UCF property has been returned prior to a leave payout. If an employee returns to an eligible position with the university during this time, they may be eligible to retain their leave balances.

Employees will be paid for annual leave accruals up to the maximum of their employment classification.

USPS employees in probationary status upon separation are not eligible for a leave payout.

Leave accrual, maximums, and more information can be found on the [UCF HR Leave and Attendance website](#).

- Post Doctoral Associates (also referred to as Post doc or PDA) leave balances are tracked internally by the department in which they work. It is the responsibility of the department to explain the terms of the leave allocation and track usage and renewal.
- Neither Post Doctoral Associates nor Physician Learners are eligible for leave payouts. Any unused balances at the end of the academic year will be forfeited.

Employees with ten continuous years of service with **UCF** will be paid a number of hours equal to one quarter of their post 1973 sick leave balance (not to exceed 480 hours).

Leave payouts will be paid via direct deposit into the same bank account(s) that you receive your regular paychecks. If you are currently contributing to the voluntary UCF 403(b) plan and/or a 457(b) through the Bureau of Deferred Compensation as of your last regular paycheck, your elected contribution will be taken from your leave payout.

If you wish to defer an amount greater than your current contribution election to the voluntary UCF 403(b) plan and/or a 457(b) through the Bureau of Deferred Compensation from your leave payout, you must contact the Human Resources Benefits Section at Benefits@ucf.edu to complete a Leave Payout Form prior to your last date of employment.

Leave Transfers

UCF does not participate in a formal leave transfer program with any agency, entity, or other organization. However, if the future employer grants additional leave hours at time of hire based upon the UCF balances, the employer should send an official note requesting the leave balance information directly to Payroll Services payroll@ucf.edu within two weeks of the separation date.



Other Important Information

Employment Verifications

UCF uses the company, Vault Verify, for secure and automated employment, income, and social service verifications. If you are in need of an employment verification prior to or after you leave UCF, visit the [HR Verification of Employment website](#) for additional information.

Workday Portal

After your separation, you may need to access [Workday](#) for various matters such as access to pay advices and electronic W-2s. To ensure that there are no issues with your access to Workday, ensure you write down your NID, and take note of or reset your password as well as verify your personal email address is correct. If you ever need to update your password after your separation, the validation code will be emailed to your personal email address and not your prior UCF email address. Please note that access to the Workday portal will expire 18 months after your job termination date.

Separation (Termination) Date

Your separation (termination) effective date is your last day of work.

Last Paycheck

Your last paycheck (and accrued leave payout if applicable) will be paid via direct deposit, so do not close your bank account yet (if you were planning to).

Jobs at UCF

If you are interested in exploring other UCF employment opportunities, you can review recently posted positions by visiting the [UCF Talent Acquisition website](#). If you have any questions on job postings, application and interviewing process, contact the UCF HR Talent Section at talent@ucf.edu or 407-823-2771.

UCF Email Accounts

Email access will automatically be deprovisioned (removed) based on the separation date in Workday.

Note: Adjuncts, GTA, and GRA employees retain access to their UCF email for a grace period of one calendar year. Employees who hold another position, have sponsored accounts, or contingent worker status will also retain access to their UCF email.

For additional information and frequently asked questions, visit the [UCF IT Access & Security website](#).

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