



EMPLOYEE EXIT CHECKLIST

The purpose of this checklist is to assist UCF employees and departments 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.

Employee Name: _____ Empl ID: _____
Department Name: _____ Termination Date: _____
A&P Executive Service Faculty Staff OPS

Department Responsibilities:

- Is Employee eligible for rehire? (Skip this item for Faculty) YES (proceed to next step) NO
Submit electronic Personnel Action Form (ePAF) and attach appropriate documentation (e.g., resignation letter) to ePAF on or before the last day of employment.
Submit HR Security eform to remove ePAF, Payroll, or other HR security access.
If exiting employee is listed as a supervisor for OPS employees, submit ePAF to update supervisor.
Audit leave records and verify all leave balances are correct.
Disable voice mail.
Disable Exchange Outlook email accounts:
Remove employee from authorized signature list(s). To inactivate DAL access, see ADDY note at:
Ensure UCF property has been returned: Remind employee that a final check may not be released until all university property is returned.
Uniforms PC's/equipment Cell phones Pagers Radios
Voyager Gas Card Purchase Card Keys (return to Facilities Operations) Other:
Notify Payroll Services if payments should be held pending return of university property.
Provide, if requested, an exit interview with department head or designee. Refer employee to Employee Exit Questionnaire at:
Contact Telecommunications at
Ensure employee has contacted Library, Health Services, & Parking Services to settle outstanding fees.
Contact Special Collections & University Archives at
Keep checklist in department files for at least three fiscal years; do not send to Human Resources.

Department Representative: _____ Date: _____
Printed Name: _____

Employee Responsibilities:

- Return library books and settle outstanding fines.
- Contact Parking Services and settle outstanding permit fees or fines. Contact computer store and settle outstanding payment plans.
- 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>.
- Complete Employee Exit Questionnaire and forward to Human Resources, <http://hr.ucf.edu/files/EmployeeExitQuestionnaire.pdf>.
- If desired, request an exit interview with department head or designee.
- Consent to electronic 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 personal email address is listed for W-2 notification.
- Leave Transfer-contact 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.

Employee Signature: _____ Date: _____

Printed Name: _____

(**Note:** If employee is not available for signature, complete the checklist to show that the department has thought through the termination process and write "signature not available" in the space above.)

General Information:

If desired, an appointment may be made with a Benefits Section team member (Benefits@ucf.edu or 407-823-2771) 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 accounts including FRS Pension Plan, FRS Investment Plan, State University System Optional Retirement Plan (ORP) and voluntary retirement savings plans (403B and 457),
- 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. Additional information is available on the HR website at: <https://hr.ucf.edu/files/SPP401a.pdf>.
- Conversion policies are available for certain supplemental plans through the State of Florida Group Insurance Program and The Gabor Agency.