



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 the appropriate amount of written notice of resignation as stated in the applicable [UCF regulations](#) may result in the employee being designated as ineligible for rehire, except in cases of medical/ family emergency, or where the employee's early departure is approved by the university.

Employee Name:

EMPLID:

Department Name:

Termination Date:

A&P

Executive Service

Faculty

Staff

OPS

IMPORTANT: Email access will automatically be deprovisioned based on the separation date in Workday. Note: Adjuncts, GTA, and GRA employees retain access to email for a grace period of one year. Employees who hold another position, have sponsored accounts, or contingent worker status will also retain access to email.

Supervisor/Department Responsibilities:

Contact your HRBC to submit separation information through Workday and attach appropriate documentation (e.g., resignation letter, ineligible for rehire documentation, etc.) before the last day of employment.

Refer employee to the [Employee Offboarding Guide](#).

Optional: For eligible retiring in-unit faculty, submit an IT Services Request, "Enterprise Email Access for Retirees," if they would like to retain use of their UCF email account after retirement. Note: If email access is requested, retired faculty must sign in at least once a year to maintain access, with each sign-in extending account validity for an additional year.

Optional: For separating researchers, contact GRITservicedesk@ucf.edu, if they would like to retain access to their UCF email account. Office of Research will determine if the individual is eligible to retain read only access to their current UCF email account. If Office of Research determines the individual is eligible, Office of Research will submit the IT services request form. **Note:** Separating researchers can only maintain read only access to their UCF email account. If email access is requested, researchers must sign in at least once a year to maintain access, with each sign-in extending account validity for an additional year.

Ask the employee if they have any expenses that still need to be reconciled. If so, collect the receipts from them.

Verify if the employee received a Relocation Stipend and separated from UCF in less than 24 months. Per university policy, the employee may be subject to the Repayment Clause. Submit a Workday Help Case to Payroll.

Arrange to deactivate electronic card access immediately following the termination by completing the [Electronic Card Access Deprovisioning Request](#) form on the UCF Department of Security's website (<https://police.ucf.edu/security>) and coordinating with your department's University Access Control Representative (UACR) and Building Liaison. This is crucial, especially if an employee has access to multiple buildings across campus.

Ensure UCF property has been returned: Remind employee that a final check may not be released until all university property is returned. *Submit a Workday Help Case to Payroll to apprise them of the situation so that the payouts are placed on hold in accordance with the appropriate procedure. *

Uniforms	PC's/equipment	Cell phones	Pagers/Radios	UCF ID Card	Voyager Gas Card
Expense Card*	Keys (return to Facilities Operations)	Other:			
Critical/Essential Personnel Badges	Access Cards	Notify UCF Technology Center to settle outstanding fees.			

*Expense or Procurement Card (employee must log into Workday-Main Menu-Requests>Create Requests-Expense and Procurement Request-Close Account)

Refer employee to the [Employee Exit Questionnaire](#). Provide Exit Interview if requested.

Deactivation of Trakka Box Access (if applicable).

Remove employee from the UCF Phonebook by notifying the representative in your department who has access to make changes through the Phonebook Admin application.

Supervisor or Department Representative Signature:

Date:

Printed Name:

Employee Responsibilities:

Review the [Employee Offboarding Guide](#).

As of your termination date and/or sponsored account affiliation end dates, your security access will be adjusted appropriately. If there are any personal documents that you need after your last day that are saved on UCF sites, please make sure to obtain them prior to your last day.

Return UCF property. (i.e., laptops, keys, cell phones, pagers, computer equipment, essential personnel badge, P-Card/Expense Card, access cards, UCF ID Card.) Close your P-Card or Expense Card by going to Workday, under menu, select Requests, Create Requests, Select Expense and Procurement Card Request-Close Account.

Provide your supervisor with any receipts for expenses that still need to be reconciled.

Submit final time and absence through Workday. Cancel any approved time-off requests effective after your last day.

Submit final expense reports (when applicable).

Contact and settle outstanding permit fees/fines/pay plans with UCF Technology Center (Computer Store), Parking Services, Library, and Student Health Services.

If desired, request an exit interview with department head or designee.

Complete [Employee Exit Questionnaire](#) and forward to HRBC or HR Center of Expertise (whichever applies),

Consent to electronic W-2 through Workday. Ensure a valid personal email address is listed for W-2 notification. **DO NOT** delete the Authenticator App, it is required for the Multi-Factor Authentication process, to access your W-2 form.

Leave Transfer-submit a Workday Help Case to Payroll 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.

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

File financial interest disclosure form (Form 1F) within 60 days after separation for those employees who have a financial disclosure requirement. Refer to <http://www.ethics.state.fl.us/>.

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.

Supervisors will receive a Workday task to upload and submit a copy of the signed form to the employee's worker profile under Personal-Documents.