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.

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CONTACT US

Office of Human Resources | Benefits Section
12201 Research Parkway, Suite 200
Orlando, FL 32826

407.823.2771  Benefits@ucf.edu  Secure eFax: 407.882.9022
hr.ucf.edu
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 here.

☐ 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 here.

☐ 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
  - Phone Number
  - Personal Email Address
  - Banking Information

☐ Review W-2 consent in the UCF Workday system.

☐ Complete the Employee Exit Questionnaire and submit to UCF Human Resources in an envelope marked "Confidential": UCF Human Resources, 12201 Research Parkway, Suite 200 Orlando, FL 32816-0140
  *Note: The completed Exit Questionnaire can also be emailed to askhr@ucf.edu.

☐ 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. Additional information can be referenced on the MyBenefits website here.

☐ 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 here.

☐ 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 option. 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 here.
- **Additional Information**: A COBRA package will be sent to your mailing address on file within two weeks following separation.

**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 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 15 of the next plan year. Review the FSA FAQs for more information.

**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 referenced here.
- **Additional Information**: If you are interested in converting to a personal policy and setting up direct pay with provider, contact provider for additional information.

Gabor Life Insurance

- **When Coverage Ends**: The end of the month in which separation of employment 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, Medical Residents, 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 or by accessing the TIAA website.
- **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 may contribute up to the IRS limit of $23.5k (or $30.5k if age 50 or older in 2024). There are no employer contributions.

- **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. This plan offers an opportunity for employees to contribute pre-tax savings from their paychecks. The plan is available to all employees and employees may contribute up to the IRS limit of $23.5k (or $30.5k if age 50 or older in 2024). There are no employer contributions.

- **Vesting Period:** Immediate
- **Eligible for Distribution:** Yes, 30 days after separation.
- **Contact Information:** Local 457 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. 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 Medical Residents 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 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 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.
**Other Important Information**

**Employment Verifications**
UCF utilizes “The Work Number” for employment verifications. If you are in need of an employment verification prior to or after you leave UCF, contact [www.theworknumber.com](http://www.theworknumber.com) or 1-800-996-7566. UCF’s Employer Code is 13845.

**Workday Portal ([www.myworkday.com/ucf/login.html](http://www.myworkday.com/ucf/login.html))**
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 password as well as your personal email address. 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 portal will expire 18 months after your termination date.

**Separation (Termination) Date**
Your separation (termination) effective date is your last day of work.

**Leave Transfers**
UCF does not participate in a formal leave transfer program with any agency, entity or other organization. However, if an employee is interested in transferring leave balances to an accepting employer, please contact payroll@ucf.edu prior to your separation date. The future employer should send an official note requesting leave balance information directly to Human Resources within two weeks of the separation date.

**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](http://www.talent.ucf.edu). 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.