### 

### ACADEMIC EMPLOYEE EXIT CHECKLIST

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ UIN: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Job Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Separation Effective Close of Business: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

##### Contact Information for future correspondence:

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Reason for Leaving (please check one):**

|  |  |
| --- | --- |
| \_\_\_\_ | Resignation |
|  |  |
| \_\_\_\_ | Retirement |
|  |  |
| \_\_\_\_ | Transferring to Another State University/Agency (Name of University/Agency\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_) |
|  |  |
| \_\_\_\_ | Other |
|  |  |

Please return completed form to your department. The completed form does not need to be sent to Academic Human Resources.

#### ACADEMIC EXIT INFORMATION CHECKLIST

Specific questions regarding benefits should be directed to University Payroll and Benefits at 506 S. Wright, Room 177; 217-265-6363; [payinq@uillinois.edu](mailto:payinq@uillinois.edu).

Specific questions regarding SURS should be directed to SURS at 1901 Fox Dr., Champaign, IL 61820; 800-275-7877 or 217-378-8800.

|  |  |
| --- | --- |
| Initial |  |
| \_\_\_\_ | I have provided my employing unit(s) with a signed letter indicating my resignation or retirement,  including my last work day. E-mail is also sufficient. |
| \_\_\_\_  \_\_\_\_  \_\_\_\_ | I have been advised to review separation/termination information in NESSIE at: <https://nessie.uihr.uillinois.edu/cf/events/index.cfm?Item_id=1123>  If I am eligible for a vacation or compensable sick leave payout, I may direct the payout into either  the 403(b) or 457(b) plan. The [Terminal Benefits Net Pay Calculator](https://www.obfs.uillinois.edu/payroll/) should be used to calculate  an estimate of the net pay received upon termination of employment with the University.  I must contact University Payroll and Benefits (506 S. Wright, Room 177; 217-265-6363; [payinq@uillinois.edu](mailto:payinq@uillinois.edu)) at least 60 days prior to separating from the  University in order to arrange a deferral into a 403(b) or 457(b) plan. An estimate of my payout  must be completed by my HR representative or business manager using the  [Unit HR Calculation Worksheet](https://nessie.uihr.uillinois.edu/pdf/benefits/UnitHRTBPCalcSheet.pdf) and faxed to UPB Benefits Services. |
| \_\_\_\_ | If my appointment is on an academic year (9/12) service basis (working 8/16 through 5/15 each  year and paid 8/16 through 8/15 each year), then I may choose to end service on 5/15 and  continue to receive monthly pay and continuation of benefits through a separation date of 8/15.  If I resign before 8/15, then I will be paid for all service already provided but not yet paid and  benefits coverage will cease at midnight on the resignation date. |
| \_\_\_\_ | If I separate from the University at the conclusion of a monthly pay period (15th of the month) in  order to become a SURS retiree effective on the first day of the subsequent month, then my  University CMS benefits coverage will continue from the 16th of the month until CMS benefits  coverage begins via SURS on the first day of that subsequent month. |
| \_\_\_\_ | I have been informed that I will receive COBRA (Consolidated Omnibus Budget Reconciliation Act) continuation coverage information from Central Management Services within 40 days of the  separation. If the information is not received within 40 days I should contact University Payroll and (506 S. Wright Street, 217-265-6363). General information regarding COBRA is  available at: <https://nessie.uihr.uillinois.edu/cf/events/index.cfm?Item_id=49> |
| \_\_\_\_ | I have been advised to contact the OBFS Accounts Receivable office (100 Henry Administration  Building, 217-333-2180) if I owe money to the University. **All debts must be paid or payment**  **arrangements made before an employee leaves campus**. |
|  |  |
| \_\_\_\_ | I have been given an informational pamphlet and advised that I may wish to contact the Illinois  Department of Employment Security concerning eligibility for unemployment compensation.  Pamphlet is available at:  <http://www.ides.illinois.gov/IDES%20Forms%20and%20Publications/CLI111L.pdf> |
|  |  |
| \_\_\_\_ | I have been advised to update my home mailing address, using My UI Info:  https://www.hr.uillinois.edu/myinfo. (My UI Info will be available 30 days after  resignation and 90 days after retirement.) Address changes after the 30- or 90-day period  must be made by contacting University Payroll and Benefits (506 S. Wright, Room 177,  phone: 217-265-6363, or email: payinq@uillinois.edu). This is extremely important as it relates  to the mailing of the W-2 form in January. |
|  |  |
| \_­\_\_\_ | I have been advised that if there are any outstanding payroll overpayments to me, I must contact  University Payroll and Benefits (506 S. Wright, Room 177; 217-265-6363; [payinq@uillinois.edu](mailto:payinq@uillinois.edu))  to resolve the overpayment issue before leaving campus. |
|  |  |
| \_\_\_\_ | I have been given the SURS Separation Refund Fact Sheet for information regarding the  withdrawal of contributions. [SURS Separation Refund Fact Sheet](https://www.surs.org/sites/default/files/pdfsx/RefundFacts.pdf) |
|  |  |
| \_\_\_\_ | Academic Professionals must complete their final time report and provide their unit with their  final vacation and sick leave usage. Faculty and Other Academics must provide their unit with  their final vacation and/or sick leave usage. |
|  |  |
| \_\_\_\_ | I have reviewed my vacation and/or sick leave usage and balances with my employing unit to  be sure all leave has been reported and balances/payout are agreed upon. |
|  |  |
| \_\_\_\_ | I have been advised that if I am accepting a position with another State of Illinois public  university or a State of Illinois agency, I may have an opportunity to transfer sick leave credit.  Employees will need to work with the new State of Illinois public university or agency. |
|  |  |
| \_\_\_\_ | For information regarding email access, please visit the Technology Services website at:  [https://answers.uillinois.edu](https://answers.uillinois.edu/illinois/page.php?id=47708) |
|  |  |
| \_\_\_\_ | I have been informed that I must contact University of Illinois Parking (1201 W. University Ave.,  217-333-3530) to terminate my parking space and payroll deduction, if applicable. More  information is available at: <http://www.parking.illinois.edu/> |
|  |  |
| \_\_\_\_ | I have been advised to return all library books before leaving the campus. |
|  |  |
| \_\_\_\_ | I have been advised to return all equipment, computers, nametags, tools, uniforms,  P-cards, telephone cards, etc., that are property of the employing department and to check  with my supervisor for proper procedures. |
|  |  |
| \_\_\_\_ | I have been advised to return my employee i-Card to my department or the ID Center (1st floor  Illini Union Bookstore) by the last day of work. Any services available by using the identification  card will cease to be effective at midnight on the date of my separation. Retirees can take their  faculty/staff card to the ID Center to obtain a new Retiree ID Card. |
|  |  |
| \_\_\_\_ | **For international (non-immigrant) employees (e.g., H-1s, J-1s, etc.): I have notified my unit**  **contact to submit my Departure Data Sheet via iSTART:** <https://sunapsis.illinois.edu> >  Administrative Services for University Departments > Departmental Services > Departure Data Sheet |
|  |  |
| \_\_\_\_ | **I understand that should I return to the University within a period of 2 calendar years, I may**  **request reinstatement of accumulated sick leave from my earlier University appointment that**  **was not compensated at the time of separation. Information regarding reinstatement can be found at** <http://cam.illinois.edu/policies/hr-81/> |
| \_\_\_\_  \_\_\_\_  \_\_\_\_ | **The following information may be of interest particularly to those planning to retire:**  General information regarding retirement can be found within NESSIE at: <https://nessie.uihr.uillinois.edu/cf/events/index.cfm?Item_id=1124>  I understand that I may not have any affiliation with the University until at least 61 days after my  retirement date. This includes teaching, advising students, research, etc. whether paid or not.  I understand that if my SURS retirement follows within 60 days of my separation from a SURS  employer, a balance of all of my cumulative/non-compensable sick leave days will be  automatically forwarded to SURS for additional SURS service credit if I am enrolled in the  Traditional or Portable SURS plan. |
| \_\_\_\_ | I understand if I have a compensable sick leave balance, I am eligible for a payout of only ½ of  the balance. The unpaid balance can be used for additional SURS service credit. I understand  that I have the ability to waive payment of any or all of the compensable balance to be directed  for additional SURS service credit. A Sick Leave Waiver form must be completed and can be  found at: [Sick Leave Waiver Form](https://www.hr.uillinois.edu/UserFiles/Servers/Server_4208/File/Leave/Sick%20Leave%20Waiver%20form%20010218.pdf). |
| \_\_\_\_ | The Faculty/Staff Assistance Services offers, free of charge, **confidential** assistance to University retirees and their families who may be experiencing difficulties that impact their lives. This includes assessments, short-term counseling, crisis services and referrals to appropriate resources. Additional information is available at: [Faculty/Staff Assistance Services](http://humanresources.illinois.edu/fsas/) |
| \_\_\_\_ | I have been notified that I can find general SURS information regarding retirement via the Frequently Asked Questions found on the SURS website at <http://www.surs.org/retirement-faq> |
| \_\_\_\_ | I have been notified of the SURS Retirement Preparation Checklist found on the SURS website at <https://www.surs.org/sites/default/files/pdfsx/RetirementPreparationChecklist.pdf> |

I understand the above information and that it is my responsibility to take any necessary action.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature Date

Please return completed form to your department. The completed form does not need to be sent to Academic Human Resources.

cc: Departmental Personnel File

Employee

Revised 04/04/18