

# Employee Exit Checklist & FAQs

Sent by SPH HR to Employee, Supervisor and HR Consultant

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

Last day of work: \_\_\_\_\_

## BEGIN 2 WEEKS PRIOR TO LAST DAY OF WORK

TASK	RESPONSIBLE	COMPLETED
In the case of resignation/retirement situations: send resignation/retirement letter to supervisor, SPH HR Consultant, and <a href="mailto:sph-hr@umn.edu">sph-hr@umn.edu</a> . Notify HR if transferring to a different University department.	Employee	
For staff, expect to receive an invitation for an exit interview from the HR Consultant. *Academic Affairs generally has connected with faculty regarding their departure by this point. The Provost's Office may contact faculty requesting an exit interview.	SPH HR	
Work with employee to communicate their exit to colleagues; recognize their service to SPH per division customs.	Supervisor	
Notify administrative units as necessary (finance, academic affairs, division administrator, IT, etc.).	Supv/Unit	
Meet with employee to discuss progress of current work projects and create plan for coverage and transfer of job duties.	Supv/Unit	
Upload projects/databases that are not on a shared folder to a unit shared space.	Employee/Supv	
If applicable, work with division administrator to obtain approval for a replacement and work with your HR Consultant to update job description for posting.	Supv/Unit	
Reassign direct reports to another supervisor as necessary and report changes to employees affected.	Supv/SPH HR	
Submit all outstanding time and absence events via MyU - My Time.	Employee	
Review and approve all outstanding time and absence events via the MyU portal.	Supv/Unit	
Contact Employee Benefits, <a href="mailto:benefits@umn.edu">benefits@umn.edu</a> or 612-624-8647, HR Consultant or <a href="mailto:sph-hr@umn.edu">sph-hr@umn.edu</a> to discuss benefits upon termination/transfer (Medical, dental, sick, vacation, retirement, COBRA, etc.).	Employee	
Contact International Student and Scholar Services (ISSS) if on a Visa.	Employee	

## BY LAST DAY OF WORK

TASK	RESPONSIBLE	COMPLETED
Cancel and destroy purchasing card.	Employee/Supv	
Cancel parking contract/Metropass contract, 612-626-7275, pts@umn.edu and return any parking card to 300 Transportation and Safety Building, <a href="http://pts.umn.edu/">http://pts.umn.edu/</a> .	Employee	
Change and share your voicemail telephone password on work phone and provide password to supervisor. Unified Messaging: <a href="https://it.umn.edu/technology/unified-messaging?km">https://it.umn.edu/technology/unified-messaging?km</a>	Employee/Supv	
Update voicemail /email with a message that indicates you are no longer in this position and leave a unit contact.	Employee	
After you leave, your access to University applications like UMN email and Google Workspace, Zoom, and Microsoft 365 will change. Learn what to expect and how to prepare on the <a href="#">Leaving the University self-help guide</a> .* *Faculty emeriti will retain access to Gmail and Google Workspace as per <a href="#">University policy</a> .	Employee/Supv	
Update personal information (for W-2 and COBRA) on the My U Portal – My Info Tab.	Employee	
Contact Department Access Coordinator to inactivate building access assigned to Employee's UCard.	Supv/Unit	
Terminate access to job-specific systems (For Peoplesoft submit a Change of Employment Status (COES) form, <a href="https://it.umn.edu/self-help-guide/enterprise-access-requests">https://it.umn.edu/self-help-guide/enterprise-access-requests</a> ; . AHC HRTS, SPH Databases, etc.).	Supv/Unit	
Confirm last day worked with SPH HR (if different than original end date).	Supv/Unit	
If applicable, complete final paperwork for severance or phased retirement program and provide to SPH HR.	Employee/SPH HR	

## WITHIN 5 BUSINESS DAYS OF LAST DAY OF WORK

TASK	RESPONSIBLE	COMPLETED
Return all division/unit owned equipment within <b>5 business days</b> of your last day worked. For example U door/locker keys, laptops, printers, or other U owned equipment/supplies to the appropriate party.	Employee/Supv	

# IMPORTANT FAQ'S FOR DEPARTING EMPLOYEES:

- University expectations are that resigning employees work their last day.
- **BENEFITS:** Medical, dental, and life insurance coverage ends on the last day of the month in which the employee actively worked. Disability coverage ends the day after the employee's last day of employment. <http://humanresources.umn.edu/benefits/leaving-u>
- **COBRA:** Employees have the option to continue UPlan benefit coverage at their own cost upon leaving the University. Information regarding the right to continue medical, dental and life insurance as well as the health care flexible spending account will be mailed to the Employee's home address upon resignation. For additional information, contact Employee Benefits at (612) 624-8647 or <http://humanresources.umn.edu/leaving-u/cobra-continuation-coverage>
- **BENEFITS FOR RETIREES:** As a retiree, employees may be able to continue the medical and dental coverage they have at retirement or enroll in a retiree plan offered through the University. <http://humanresources.umn.edu/benefits/benefits-retirees>
- **VACATION PAYOUT:** Each employee group has its own policy for paying out unused vacation hours. (The University does not pay out employee sick time balances.) The vacation payout will occur on a separate paycheck following the employee's final paycheck. <http://humanresources.umn.edu/benefits/leaving-u>
  - **Faculty and P&A:** When a faculty or P&A staff member has worked 67% time or greater for 11 months or longer, any unused vacation days (up to the maximum of one year's accumulation of 22 days) may be paid out when the employee ends University employment.
  - **AFSCME Clerical or Technical:** An employee who leaves University employment and still has remaining vacation available is entitled to be paid for unused vacation.
  - **Civil Service:** Civil service staff who leave the University with 10 years or more of service and 200 or more hours of vacation will have their payout deposited into an individual, tax-free account, called a Health Care Savings Plan, to be used to reimburse post-employment medical expenses. Employees who leave University employment with fewer years of service or hours of remaining vacation are entitled to be paid for unused vacation.
- **FLEXIBLE SPENDING ACCOUNTS:** Your FSA stops with the last contribution from your last paycheck. If you still have money in your FSA, and you don't have enough eligible expenses before termination to use up the balance, you can avoid losing the money if you elect to continue participation through COBRA. Contributions made through COBRA are done so on an after-tax basis. This allows you to continue to submit claims for expenses as long as you make contributions to the plan. <http://humanresources.umn.edu/flexible-spending-accounts/leaving-u-and-your-fsa>
- **FACULTY RETIREMENT PLAN (Faculty and P&A):** For Information on fund distribution options upon termination contact Fidelity at (800) 343-0860 or Employee Benefits at (612) 624-8647 or [benefits@umn.edu](mailto:benefits@umn.edu).
- **MN STATE RETIREMENT SYSTEM (Civil Service/Labor Represented):** For information on vesting and early retirement, visit the [MSRS website](#). To learn about MSRS fund distribution options upon termination, contact MSRS directly at (651) 296-2761 or [msrs@state.mn.us](mailto:msrs@state.mn.us).
- **EMAIL:** Former employees will be able to access their email account for up to two weeks after their last day of work. University Alumni and retirees will have continued email access indefinitely. <http://humanresources.umn.edu/benefits/leaving-u>
- **ACCESS TO MyU/UPDATING HOME ADDRESS:** The former employee's W-2 form will be sent to the last address on record. To update address information, go to the MyU Portal – My Info Tab. Your Internet ID and password will remain active until December 31st of the year following the resignation. This will allow continued access to the MyU Portal to be able to update an address. <http://humanresources.umn.edu/benefits/leaving-u>