Exit Checklist

This checklist assists departments, employees, and Human Resources complete the termination process. It should be completed prior to employee’s last day of work. **Departments:** Fax this form to Benefits Office at 312/996-5733.

### Employee Responsibility

- Submit resignation, if appropriate
- Contact State University Retirement System (SURS) 1-800-275-7877, particularly if retiring
- Access NESSIE: update W-4 form, address and phone number (final W-2 mailing)
- Give contact information to Benefits
- Return University I-Card (Photo ID Office at 1790 SSB or 241 CIU)
- Cancel parking/transit allotment
- Submit any outstanding Medical Care Assistance Plan (MCAP) and/or Dependent Care Assistance Plan (DCAP) claims to Fringe Benefit Mgmt Co., 800-342-8017
- Clean out desk/locker
- Submit completed Employee Exit Checklist to Benefits Office at: 312/996-5733.

**Check the box for benefit items that apply to you:**

- I am transferring to another State of Illinois organization
- I am retiring
- I have Health and/or Dental Insurance
- I have Reliastar Term Life Insurance
- I have Long-Term Disability insurance
- I have Life Insurance
- I contribute to a 403B Savings Plan
- I contribute to a 457 Savings Plan

### Department Responsibility

- Provide IDES brochure or online link
- Collect building keys/access card, credit card, office supplies and equipment
- Contact Facilities Management to remove access to building
- Terminate employee access to computer systems
- Terminate EPAF authorization, if applicable
- Terminate voicemail/e-mail message
- Audit final time card and pay. **Note:** Final payout should not be forwarded to Payroll until keys, equipment and other items have been collected by the unit.
- Submit PITR to end job within five days of termination date; can be sent before last day
- Update Taken field on PEALEAV after final calc date; may need to adjust Accrued for partial month
- Process DART separation
- Process Pay Adjustment, if pay-out due. **Note:** Final payout to be made only when there is no outstanding balance owed by employee
- Fax completed Employee Exit Checklist to Benefits Office at: 312/996-5733.

### Benefits Office Responsibility

- Notify CMS if employee is transferring to another State of Illinois organization
- Advise of COBRA for Health and Dental Insurance
- Advise of portability for Reliastar Term Life Insurance.
- Advise of portability for Long-Term Disability
- Advise of 30-day portability for Life Insurance.
- Advise of options for 403B Savings Plan
- Advise of options for 457 Savings Plan
- Notify CMS of discontinued contributions to MCAP/DCAP

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Supervisor/Dept Head Signature _________________________________ Date: ____________

Employee Signature _________________________________ Date: ____________

Benefits Office Signature _________________________________ Date: ____________

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