

## Faculty & Staff Separation Checklist

We would like to thank you for your time and service at UTRGV and wish you the best on your new endeavors. Please print and use it as a reference guide to complete the separation process.

### **Instructions Employee Separation**

As an employee who is separating from UTRGV, you will receive an Employee Separation email. We have created an employee separation checklist to assist you in completing your separation with the UTRGV (you may review this checklist with your supervisor to coordination with the completion process; this form is for your records). Below are the instructions for the separation checklist.

Employee submits letter a resignation.

The supervisor will enter the employee separation in the HR Portal system.

*\*Please note that the supervisor is responsible in completing the separation form and this is only processed when the employee separates from the university.*

### **Separation Process Checklist:**

- \_\_\_\_\_ Complete and submit your timecard – *if applicable* (timecards that are not completed may cause a delay on the vacation settlement); If the employee has separated and no longer has access to PeopleSoft to complete the timecard, a paper timecard will need to be submitted to the supervisor or to HR at [hr@utrgv.edu](mailto:hr@utrgv.edu)
- \_\_\_\_\_ Return university equipment such as iPad, secure USB flash drive, laptop, and/or any other equipment that belongs to the institution.
- \_\_\_\_\_ Return any/all procurement/travel cards to your supervisor (your supervisor will forward them to the Purchasing Office).
- \_\_\_\_\_ Submit keys to the Facilities Operations Department (this includes vehicle keys or keys to any other facility or equipment).
- \_\_\_\_\_ Submit ID badge (and/or access card) – supervisor will submit to Campus Card Services
- \_\_\_\_\_ Save contacted and received clearance from the library of any fees/checked out items

### **UTRGV Insurance:**

All insurance coverage plans will terminate at the end of the month of separation.

Example: If separation date is 01/05/25, benefits will terminate on 01/31/25

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### **Life Insurance**

- If your insurance benefit terminates, you are eligible to continue your Voluntary Life, Voluntary Dependent Life coverage by applying for continuation. You must apply for the continuation within 31 days of the date of termination of coverage. For any additional questions, please reach out to BCBS at (866) 628-2606. The link to application form is found here: [Portability Application](#).

### UT Flex Plans

When an employee separates employment, it is important to utilize your remaining UT Flex balance. UT Flex funding will be inaccessible after separation date.

### COBRA

COBRA (Consolidated Omnibus Budget Reconciliation Act) is a federal law under which employees and their covered dependents have the opportunity for a temporary extension of medical, dental and/or vision coverage at group rates in instances where coverage under the plan would otherwise end. In certain cases, it may be possible to continue HCRA coverage. The employee or dependent is responsible for the entire premium for COBRA coverage plus a two percent administrative fee.

The COBRA notice will also be sent to you by mail by the COBRA Administrator (VOYA), **to the address we have on record**, within 14 days of coverage end date. If you do not receive the COBRA notice by mail, please contact [benefits@utrgv.edu](mailto:benefits@utrgv.edu).

For more information regarding COBRA click on the link below: <http://www.utsystem.edu/offices/employee-benefits/cobra-coverage>

### Remaining Sick Leave Balance:

- Your remaining unused sick leave hours can be transferred to another state agency within 12 months or the hours will expire (see HOP [ADM 04-603](#)); If continuing employment with another State Agency please notify HR (we will contact salary admin/records to indicate continuance of other state employment on your file); no further action is needed, from you
- If you are not transferring to another state agency, you may donate remaining sick leave hours to the Sick Leave Pool (see HOP [ADM 04-604](#)); the Sick Leave Pool (SLP) donation form is attached to your separation email (complete and email to [benefits@utrgv.edu](mailto:benefits@utrgv.edu)) or submit to the Human Resources office
- Or you may also donate hours to a specific recipient, who has previously applied for SLP hours and has exhausted the hours awarded

***\*\*\*Please note that your supervisor will need to enter the correct reason code indicated on the separation form if you will be transferring to another state agency (this will indicate sick leave balance will be transferred).***

\_\_\_\_\_ Transferring to another state agency

\_\_\_\_\_ Donated to Sick Leave Pool - [DocuSign](#)

\_\_\_\_\_ Direct Sick Leave Donation – Donor Form - [DocuSign](#)

Remaining Vacation Leave Balance: *If Applicable*

- If your termination is due to re-employment with another state agency, without a break in service (within 30 days of separation from UTRGV), the unused vacation leave balance will be transferred to the receiving state agency. (see HOP [ADM 04-602](#)) If continuing employment with another State Agency please notify HR (we will contact salary admin/records to indicate continuance of other state employment on your file); no further action is needed

\_\_\_\_\_ Transferring to another state agency

\_\_\_\_\_ Vacation Payout

\_\_\_\_\_ Deferred to a TSA 403(b)/DCP-457(b) account: \_\_\_\_\_ All \_\_\_\_\_ Partial

Please notify our office of your decision for your remaining vacation leave balance as soon as possible so that we can process the settlement or deferment in a timely manner.

*\*\*Please note that your supervisor will need to enter the correct reason code indicated on the separation form if you will be transferring to another state agency (this will indicate sick leave balance will be transferred).*

Teacher Retirement System (TRS) – *If Applicable*

Your Teacher Retirement System contribution options are:

- Keep contributions in your existing TRS account; no further action is needed from you
- If continuing employment with another State Agency or other TRS retirement contribution entity, no action is needed from you
- You may leave the funds in your TRS account until retirement; no further action is needed from you
- Contributions may be refunded or rolled into an approved retirement account ([TRS 6 Form: Application for Refund](#) can be found on the TRS website).

It is recommended that you speak to a TRS representative prior to completing and sending the TRS 6 form by calling 1-800-223-8778.

Optional Retirement Program (ORP) – *If Applicable*

- Please contact your ORP vendor

Voluntary Retirement Program – *If Applicable*

- Please contact your vendor regarding any of the following voluntary retirement account(s)
  - TSA 403b - Traditional
  - TSA 403b - Roth
  - DCP 457b - Traditional
  - DCP 457b - Roth

NOTE: UTRGV Benefits office will submit Vesting/Termination form to your vendor which will allow you to access funds in ORP or Voluntary retirement plans within 14 days of your separation date.

Transferring to another UT institution or state agency in Texas:

- Contact the HR office of the agency that you are going to and ask them about their process to obtain leave and service information.

Office of Human Resources  
Brownsville: (956) 882-8205  
Edinburg: (956) 665-2451