

EXIT/RETIREMENT CHECKLIST\*

\*For employees retiring, separating, or leaving for a private employer or transferring to another state department of state/county jurisdiction

NAME: \_\_\_\_\_ TITLE: \_\_\_\_\_

RETIREMENT/TERMINATION DATE: \_\_\_\_\_ Transfer To (If applicable): \_\_\_\_\_

NEW CONTACT NUMBER: \_\_\_\_\_ EMAIL: \_\_\_\_\_

- Enter a check mark (X), date completed or not applicable (N/A) in right column.
- Items marked in RED not link to an appropriate site or document.
- If "Action to be Taken" document is printed for files, ensure that most current document is used.

ITEM	Date Completed
<a href="#">Click here for detailed information on action to be taken</a>	
<b>*****DEPARTMENTS*****</b>	
Resignation or Retirement Letter	
"What you need to know" Document	
Form D-60	
Hawai'i Employer-Union Health Benefits Trust Fund (EUTF) - Health Benefits	
Leave Donation	
On-line Leave System	
Profiler	
403 (b) Tax-Deferred Annuity (TDA) Program	
457 Deferred Compensation Plan (Island Savings Plan (ISP))	
Bus Pass, Handi-Van, vRide (O'ahu only)	
Mailing Address and Phone Number	
Flexible Spending Account	
Pcard	
Parking	
Keys (office, desk, cabinet, etc.)	
Faculty/Staff ID	
Uniforms, State-owned Tools, Equipment and Supplies	
Computer / Network Access	
Voice mail password, alarm code	
UH Directory	
UH Email Info	
<b>*****HUMAN RESOURCES*****</b>	
Peoplesoft / PNF	
Form G-2	
Form G-2A	
Official Personnel Folder	
Form I-9	
General Confidentiality Notice	
Tuberculosis (TB)	
APT Broadband System (Contact Information System) (Performance Evaluation System)	
Application Security Worksheets (Kuali Financial System)	
ERS Contributions for Vacation Payout for Employees Hired Prior 1971	

COMPLETED BY: \_\_\_\_\_ DATE: \_\_\_\_\_

KCCExitChecklist Rev: 5/22/2015

**RETURNING TO WORK AT THE UNIVERSITY AFTER RETIREMENT:** Effective January 1, 2011, all ERS retirees employed by the State or county must meet the following requirements under Section 88-9, HRS.

- A six (6) consecutive month break in State or County employment, including the Research Corporation of the University of Hawai'i (RCUH), prior to the first day of employment if the retiree is employed in a position that is excluded from ERS membership.

**OR**

- A twelve (12) consecutive calendar month break in State or county employment, including the RCUH, prior to the first day of employment if the retiree is employed in a position identified as a labor shortage or difficult to fill position.

Please be advised that the law does not prohibit the employment of retirants who are re-enrolled as active ERS members when they return to State or County employment. Upon re-enrollment, the retirant's pension and other retirement benefits will be suspended until the member retires again.