



Human Resources & Payroll Retirement Checklist

Employees Retiring - Read and initial each statement

- ___ 1. **Submitted Letter of Resignation/Retirement to your supervisor.**
- ___ 2. **Final Paycheck:** Contact Dannette Starr, Payroll Manager, for your final paycheck date.
- ___ 3. **Payment for Unused Vacation: You will be paid for any unused vacation you have accrued. This payment may be made with your last regular paycheck or** on the next regular payroll cycle following your final salaried paycheck. Contact Dannette Starr, Payroll Manager for verification of this date. Standard tax deductions will be applied.
- ___ 4. **Unused accrued sick leave is not paid out:** Retirees may be eligible to use their unused sick leave for premium payment if enrolled in the Colleges retiree health insurance plan or approved Medicare Supplemental Plans. Contact Pam O'Dell, Benefits Coordinator for more information regarding sick leave.
- ___ 5. **Medical & Dental:** Contact Pam O'Dell for Cobra or Retiree Insurance Information. You may contact Select Health at 888-367-2117 for a HIPPA Certificate of Coverage if needed. This may be helpful when applying for your next insurance plan.
 CSI benefits will end on the last day of the month if your termination date is the 1st through the 14th
 CSI benefits will end on the last day of the following month if your termination date is the 15th through end of the month.
 - Contact **SHIBA** (Senior Health Insurance Benefits Advisor) for Insurance Advice 208-736-4713
 - 65 & Over Contact Toni Price, **HUB International**, for group-sponsored Medicare retiree medical plans approved for the sick leave entitlement. 208-737-6438
 You **must** have Medicare A & B Prior to contacting Hub International.
- ___ 6. **Basic Life Insurance:** Coverage for the Basic Life Insurance will end on your last day of active work.
- ___ 7. **Voluntary Life Insurance:** Contact LifeMap Customer Service at 888-777-9368, opt 2 for information about conversion to a private plan. Contact Pam O'Dell for the application to convert the policy.
- ___ 8. **NCPERS: \$16.00 Insurance through Prudential – 800-525-8056** This Life insurance may be continued into retirement, **ask for application.**
- ___ 9. **FSA – Flexible Spending Account: PacificSource - 800-422-7038**
- ___ 10. **Retirement Contacts:**
 PERSI: (800) 762-8228
 TIAA/CREF: (800) 842-2776.
 VALIC: (800) 892-5558 Ext. 88063
- ___ 11. **Payroll Deductions:** All Payroll deductions will cease with the last payroll paycheck. Contact the Dannette Starr, Payroll Manager at 732-6270 with any questions.
- ___ 12. **College Property:** All College Property must be turned into your supervisor by the last date of employment.

___ Keys	___ Staff Card,	___ Uninstall College owned software
___ P-Card	___ Cell Phones	Other _____
___ Laptop	___ Library Materials	_____
- ___ 13. **Change of Address:** Inform Human Resources of all address changes to ensure you will receive your W-2 statement.

_____ 14. **Email & College Communications:** Your CSI email will only remain active for 30 days following your last day of work. You need to redirect your email to a private account after the 30 days. You can subscribe to the enotes with your private email by following the steps below.

- 1. Send an email to listserv@lists.csi.edu
- 2. Type: "Subscribe CSIEmployeeInfo" into the body of the message. You do not need to add a subject
- 3. Include your name in the body of the message; for example: Subscribe CSIEmployeeInfo John Doe

You will receive a confirmation email message from the listserv with instructions for completing the listserv subscription. There will be a link in the message to click on to confirm your subscription.

_____ 15. **Exit Interview:** Complete the Exit Interview form and discuss with your supervisor during the interview. The purpose of the exit interview is to address any questions, comments, or concerns regarding your employment at the College of Southern Idaho.

Employee Name (Print)

Employee Signature

Date



Supervisor's Termination Checklist, Initial each statement

- _____ 1. Obtain a letter of resignation from the employee.
- _____ 2. Complete the termination portion of the Resignation/Termination form & submit with the resignation letter to the Human Resource Office.
- _____ 3. Contact the IT Helpdesk to change or transfer calls and emails until a replacement is found.
- _____ 4. Employee must return all **College Property** by the last date of employment.
 - _____ Keys _____ Staff Card _____ Uninstall College owned software
 - _____ P-Card _____ Cell Phones Other _____
 - _____ Laptop _____ Library Materials _____
- _____ 5. Notify key contact people on campus with whom the employee works regularly.
- _____ 6. Ask employee if they will have a change of address. If so, have them contact HR with that information.

Supervisor Name (Print)

Supervisor Signature

Date