

# UC San Diego Health

## Exit Process and Check-List

As your training rapidly approaches an end, things are about to get very crazy for you very quickly...if they haven't already! Use this as a guide and it will help make your transition much smoother.

Please review the information carefully. You may not even be aware of the changes about to happen as a result of your separation...or the options available to help navigate the changes.

Keep in mind, the [OGME Check-out](#) is intended to supplement departmental process(es), not supersede them. You can find this checklist on our website as well.

<https://medschool.ucsd.edu/education/gme/house-officer/Pages/House-Officer-Checkout.aspx>

We wish you the best of luck as you embark on your next life chapter armed with all that you have learned professionally, academically and personally during your time at UCSDH. There is much to do as you prepare for this transition. Taking care of these things now WILL save you time, money and frustration later...don't let these become an issue.

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## 1. Cobra Insurance Coverage

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General information is available on the OGME [Exit Process](#) web page. There you will also find the link for detailed [Cobra](#) information and instructions. Shortly before your termination date, you will receive a notice of eligibility directing you to the OGME website for forms and information.

If you have accepted a UCSDH Career appointment, you need to enroll into the Career health plans; you are NOT automatically enrolled regardless of what you may have been told.

To obtain a Certificate of Credible Coverage (required when being added to someone else's insurance) submit request via email Keith at [gmebenefits@ucsd.edu](mailto:gmebenefits@ucsd.edu).

## 2. Request for Credible Coverage (Proof of Health Insurance)

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If your spouse/partner will be adding you/your family to their coverage after graduation, you should expect their employer to require, "either a HIPPA Certificate or letter of credible coverage", before you/your family can be added to that policy.

Keith Pettis, our Benefits Coordinator, will be able to provide the necessary documentation. For the most expeditious response, enter "**[Name] Request for Letter of Credible Coverage**" in the subject line of the email you send to Keith at [gmebenefits@ucsd.edu](mailto:gmebenefits@ucsd.edu) for processing.

## 3. W-2 & 1095-C Delivery AND Taxation of Nonresident Aliens

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### A. View/Save: Earnings Statement and Prior Years W-2 and 1095-C

Through [UCPath](#) you have access to both your Earning Statements, W-2(s) and 1095-C(s) (proof of insurance coverage) statements. Alumni access will remain active for approximately 3 years after termination as required by law.

### B. W-2 Delivery for Current House Officers and Alumni

Regardless of your employment status, the default delivery method for the W-2 is email. ***To ensure access to your W-2, you MUST have your personal email address entered in UCPath.*** To verify/update your contact information, sign into UCPath, navigate to Employee Actions > Personal Information (twice) > Click to open Email Addresses. Remember, **DO NOT USE YOUR HEALTH.UCSD.EDU EMAIL ADDRESS** or you won't get it. To follow is the link to register with UCPath after graduation: <https://ucnet.universityofcalifornia.edu/compensation-and-benefits/ucpath-former-employees.html>

### C. 1095-C Delivery for Current House Officers and Alumni

Paper copies are sent via the mail; electronic copies will be available. The Affordable Care Act (ACA) requires employers/health plans to provide employees proof of health insurance coverage but the 1095-B and/or 1095-C form is not necessary to file your taxes. The document is for your information and records only.

### D. Taxation of Nonresident Aliens

[Who must file?](#) Nonresident alien resident/fellows temporarily present in the United States on an "F", "J", "M" or "Q" visa, must file [Form 1040NR](#), U.S. Nonresident Alien Income Tax Return (or [Form 1040NR-EZ](#), U.S. Income Tax Return for Certain Nonresident Aliens With No Dependents).

For specific questions or help, you can contact Roark Miller ([rtmiller@ucsd.edu](mailto:rtmiller@ucsd.edu)) in the International Faculty & Scholars Office.

## 4. Retirement Benefits

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You have been making [mandatory contributions](#) into your Fidelity managed retirement fund for the duration of your appointment. Fidelity will continue to manage your retirement unless you want to rollover or withdrawal your funds. Any questions regarding your retirement can be answered by [Fidelity](http://netbenefits.fidelity.com). (<http://netbenefits.fidelity.com>)

## 5. Proof of Professional Liability Coverage & Claim History

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While you may receive an offer of employment from a health care facility, you won't be able to work until they have completed their credentialing process. Part of the process will require proof of liability coverage for the duration of your appointment and a claim history. Liability Request forms and FAQs are available in [MedHub](#) > Home > Resources/Documents > Liability Request Forms. Unless otherwise specified, a claim history will be provided for all requests. Follow the instructions in the Request Form and plan accordingly as letters can take up to 36 days to complete from the day you receive an acknowledgement of receipt.

## 6. Fee Exempt DEA Certificates

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"Fee Exempt" DEA Certificates are institution specific and only valid within the course and scope of your training. Upon graduation fee waived DEA certificates registered with UCSD are no longer valid. [I would strongly suggest initiating the process that suits your needs best, before you graduate.](#)

A. Options for a "fee exempt" DEA Certificate:

- i. For the price of a new DEA Certificate, you can keep your current DEA, however, the purchase will not extend the expiration date. If your fee waived DEA within the year; paying the fee won't change the expiration date; it will still expire within the year
- ii. Purchase a new DEA Certificate with an altogether different number;
- iii. If you are continuing your training elsewhere, and the institution is fee exempt qualified, you will need to change your institution and address to reflect them as your institution of record in order to use your exempt certificate.

B. To register/purchase an un-restricted certificate or change your address of record: <http://www.deadiversion.usdoj.gov/>

## 7. Health and Immunization Records

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As a patient, you can access any/all records for procedures/immunizations you received during your appointment, including health screenings and immunizations regardless of your professional/educational status through [MyChart](#). Contact IT for help getting set up (619) 543-4357 or 3HELP). If your TB/Fit Test or annual flu shot records are not in MyChart, contact [tbcontrol@health.ucsd.edu](mailto:tbcontrol@health.ucsd.edu) for assistance.

## 8. UCSD Email – health.ucsd.edu accounts are deactivated upon graduating

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Upon graduating/termining, **UCSD email accounts are purged**. UCSD email accounts are not forever. In an effort to avoid unintended HIPPA violations, UCSD will not allow health.ucsd.edu emails to be forwarded to personal email accounts.

### A. Be pro-active

- i. Let people know how to reach you post-graduation
- ii. Notify/inform personal and professional contacts of your impending status change and
- iii. Send important emails/information to your personal email account; information cannot be retrieved once the account has been purged

### B. Gone but not forgotten

- i. [Activate](#) both an internal and external “[Out of Office](#)” message
- ii. Out of Office message: let emailers know who to contact in your absence and how
- iii. Provide your forwarding contact information as you feel is appropriate/necessary
- iv. [Start managing your Outlook files NOW](#)
  - a. [Clean-up your inbox](#); you don't want to miss something
  - b. forward important emails to your personal email account
  - c. notify contacts how/where you can be reached after your last day

## 9. Who Needs to Know You're Graduating/Terming?

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Please provide your forwarding address to your department coordinator. Your certificate of completion will not be released to your department until we receive your forwarding address. If you do not have a forwarding address, you may use your permanent address.

### **DON'T forget to change your address with the following:**

- A. MBC [BreZze - State of California](#)
- B. OMBC <https://www.ombc.ca.gov/licensees/>
- C. DEA [https://www.deadiversion.usdoj.gov/online\\_forms\\_apps.html](https://www.deadiversion.usdoj.gov/online_forms_apps.html)
  - Select the [Registration Change Requests](#) option
- D. NPI <https://nppes.cms.hhs.gov/NPPES>
  - If your NPI was issued prior to licensure and not updated, our Taxonomy status is still “Student”. Step by Step instructions and information are available in MedHub > Home > Resources/Documents > For House Officers > NPI Registration
  - DO NOT leave without updating your information
- E. UCPath <https://ucpath.ucsd.edu>
  - Update your personal email and mailing address for W2 information/access
- F. MedHub <https://ucsd.medhub.com/index.mh>
  - Update your personal mailing address

## 10. Remember the Little People

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There were a number of people in a variety of departments who have devoted immeasurable time and effort, both directly and indirectly, to provide you with the best educational experience available. Before you move on to put your training into practice, please take a few minutes to reflect on your time at UCSD. Are there individuals whom you feel should be recognized? Let their supervisor(s) know of their contributions. It will make a difference.

### Exit Checklist

Proof of Insurance (letter of credible coverage) \_\_\_\_\_  
\_\_\_\_\_

Cobra enrollment Information \_\_\_\_\_  
\_\_\_\_\_

Proof of Coverage & Claim History Requested \_\_\_\_\_  
\_\_\_\_\_

Earning Statements emailed/saved to external drive/printed \_\_\_\_\_  
\_\_\_\_\_

UCPath Updated (Personal Email Address) \_\_\_\_\_  
\_\_\_\_\_

Retirement – contacted Fidelity \_\_\_\_\_  
\_\_\_\_\_

Updated contact information: \_\_\_\_\_

MBC/OMBC/Pharm       DEA       NPI       CURES       PECOS

MedHub – forwarding address entered \_\_\_\_\_

Email –

Important emails sent to personal email account

Out of Office turned on \_\_\_\_\_

Cleaned out Inbox \_\_\_\_\_

Friends/colleagues know where/how to reach you

Everyone else knows who to reach instead of you

Program/Department Stuff:

Returned ID Badge     Returned Pager & Keys     Obtained Letter(s) of Recognition

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“Other stuff I gotta do” List