University of Pittsburgh | Office of Human Resources

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Separation Guide and Checklist for Staff Employee

This guide helps to ensure a smooth transition for employees who are terminating employment (leaving the University) or transferring departments. This guide also provides detailed information for terminating staff on how their University benefits will be transitioned.

Employee Separation Checklist

General Checklist

- ☐ **Resignation Letter**: A resignation letter must be submitted to your supervisor. If you are retiring from the University, your resignation letter should be submitted 3 months prior to your retirement date.
- ☐ **Pitt Worx:** Your final timecard and any additional, missing timecards must be submitted and approved in Pitt Worx by the end of your last working day. If you have supervisor responsibilities within Pitt Worx, please work with your department administrator to make updates to assign this responsibility to the appropriate person(s).
- ☐ **Form W-2 Access**: Prior to your last day of employment, log into ADP (my.pitt.edu > Pitt Worx > Me > Form W-2 Information) and update your contact preferences to include a personal email address and phone number that you will have access to. Once you are inactive or terminated, you must create a separate ADP account to view your electronic Form W-2. We encourage all employees to opt in for electronic Forms W-2.
- ☐ **Address Change**: Please visit the Payroll website for instructions on how to update your address after your separation date.
- ☐ **University ID**: University IDs and badges must be returned to your department administrator on or before your final working day.
- ☐ **Return of University Property**: All University property – parking pass, office keys, books, phones, computer equipment, etc. – must be returned to the department administrator on or before your final working day.
- ☐ **Retaining Pay Slips Prior to Termination**: Your access to Pitt Worx becomes unavailable upon termination. Please ensure you save or print any needed pay slips prior to your last day. Instructions for accessing your pay slips may be found on the employee self-service web page.
- ☐ **Separation Interview**: Contact your department administrator to schedule a separation interview.

Systems/Technology Checklist

- ☐ **Phone**: Set up an out-of-office message on your University phone. Contact your department administrator for guidance on what should be included in the message.
- ☐ **Email**: Set up an out-of-office message on your University email account. Contact your department administrator for guidance on what should be included in the message. If you are an official retiree of the University and would like to retain your University email address into retirement, notify your department administrator of your request prior to your retirement date. Your department must approve your request and notify HR if it is to be retained.
- ☐ **University Files, Records, and Emails**: University files, records, and emails should be forwarded to your department supervisor or other individual within the University to whom you have been instructed will assume your responsibilities prior to your final day of employment. You will not have access to any University servers or emails following your separation from employment. All University files, records, and emails should be removed from your personally owned devices prior to leaving the University, which your supervisor will confirm.
- ☐ **University-Owned Mobile Phone Service Agreement**: Your phone should be returned to your department supervisor who will work with Telecom to transfer, deactivate, or suspend your current phone number.
- ☐ **Personal Files, Records, and Emails**: Personal files should be removed from all University-owned equipment prior to your final day of employment.
- ☐ **Current Litigation**: If you have received a Litigation Hold Memorandum from the Office of General Counsel (OGC) in the last 24 months, you must confirm that OGC has received all relevant files, records, and emails from you regarding that litigation prior to your final day of employment.

Benefits Eligibility Upon Separation

Participation in Pitt's insurance programs will continue until the end of the month in which your last active working day occurs, provided your last pay includes employee contributions towards insurance coverage.

- ☐ **Medical, Dental, and Vision Plans**: Information concerning the continuation of coverage, according to federal regulations known as the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA), will be sent to you automatically by Benefits Management Services (BMS), the University's third-party administrator. For questions about your COBRA coverage, contact BMS at 1-888-499-6885.
- ☐ **Life Insurance**: Life insurance coverage carries a conversation privilege which entitles you to change a whole life policy. Optional life insurance and dependent life insurance are also portable and available at group rates. You must convert/port within 31 days following the payday that occurs after your last active working day. There are no special conversion privileges for Accidental Death & Dismemberment (AD&D) insurance. For questions about your life insurance policies, contact Aetna at 1-800-523-5065.
- ☐ **Disability (Short-Term and Long-Term)**: Disability insurance coverage will continue until your last active working day. There may be applicable provisions depending upon the date of disability in relationship to the actual last active working day.
- ☐ **Flexible Spending Accounts**: Claims incurred on or before your last day of employment may be submitted for reimbursement. Claims for the current plan year must be submitted within 180 days after separation. For questions about your flexible spending account(s), contact UPMC at 1-888-499-6885.
- ☐ **Long-Term Care**: You may be elect to continue the same coverage you had under the University's group policy on a direct billing basis with Unum. The University will notify Unum of your separation. Unum will automatically send you an invoice to continue coverage after your separation. For questions about long-term care coverage, contact Unum at 1-800-227-4165.

Retirement Plans

- ☐ **Defined Contribution Program**: You may leave your contributions in your account, transfer, or access the accounts through a variety of withdrawal and income options. If your participation is fully vested, all funds – including all contributions made by the University – remain in your TIAA account. If you are not vested, only the contributions you have made remain in your account.
- ☐ **TIAA**: You have lifetime income options along with cash withdrawal options. The TIAA Traditional Account is available in a lump sum when withdrawn within 120 days following your employment and is subject to a 2.5% early withdrawal fee. There is no fee when the TIAA Traditional Account is paid out as a life annuity. You may also elect to receive your CREF accumulations as lifetime income and/or cash withdrawal payments. There is no fee imposed on CREF withdrawals or any TIAA mutual fund account withdrawals. All actions are subject to terms stipulated by the University's plans, TIAA Funding Vehicles, and related IRS regulations. Contact the University Retirement Support Center at 1-800-682-9139 with questions or requests for different forms of benefit.
- ☐ **Noncontributory Defined Benefit Pension Plan**: For participants who terminate employment at any age other than retirement age and have participated in the plan for at least 5 vested years, your benefit will be held in a trust fund at Bank of New York Mellon (BNY Mellon) until such time that you meet the requirements of normal retirement. For questions related to the Noncontributory Defined Benefit Pension Plan, contact the Pension Administration Center at 1-866-283-0208.

Other Benefits

- ☐ **Education Benefits**: For education benefits issued for a particular term or session to remain in force for the entire term/session, the staff member must remain employed in an eligible status as follows, subject to review with respect to end dates of the terms/sessions – fall term (actively working on the last business day of October), spring term (actively working on the last business day of February), and summer term (actively working on the last business day of June).
- ☐ **Credit Union**: Proper arrangement for your account(s) and loans must be made with the credit union office prior to your separation date. Greater Pittsburgh Federal Credit Union can be contacted at 412-621-6800. Johnstown employees can contact the C-B-W School Federal Credit Union at 814-487-5714.
- ☐ **Unemployment**: For Pennsylvania unemployment eligibility, contact PA Unemployment at 1-888-313-7284 or visit their website at uc.pa.gov.

General University Policy and Guidelines from the Staff Handbook

☐ **Separation Date:** The official separation date is your last active working day. Vacation, sick, personal, holiday, and recess days do not constitute the last active working day. If you separate the day before a University-designated holiday or recess day, you are not eligible to be paid for that University holiday or recess day.

☐ **Payment for Unused Vacation Time Upon Separation***: You are eligible to receive payment for any unused vacation time up to the vacation cap, as outlined in the Staff Handbook.

When a staff member terminates from the University, vacation accruals will be prorated for the pay period in which the staff member terminates in accordance with their official date of termination.

- For exempt (monthly paid) employees, payment for eligible unused vacation time will be payable in your final payment if your last day worked was on or before the 15th of the month. If your last day worked was after the 15th of the month, the eligible unused days will be payable in a separate payment processed in the subsequent pay period. Payout of vacation time within these timeframes is dependent on the termination processing date in Pitt Worx.
- For non-exempt (biweekly paid) employees, payment for eligible unused vacation time will be payable in the staff member's final regular payment. Payout of vacation time within this timeframe is dependent on the termination processing date in Pitt Worx.

Note: Final payments will be made via the payment method that you had as of your last day of work. If you have direct deposit on file, your payment will be made via direct deposit. Refer to the Staff Handbook for additional information.

☐ **Payment for Unused Sick Time Upon Separation***: You may be eligible to receive payment for unused sick time if certain age and service criteria are fulfilled. If a staff member has reached 60 years of age or older and has a minimum of 10 years of service or is at least 55 years of age and has a minimum of 25 years of service, at the time of separation, you will receive a payment based upon the amount of unused sick time accrued. The payment will be equal to (a) accumulated unused sick time multiplied by one half of the final base pay daily rate, or (b) $2,500 – whichever is less.

- For exempt (monthly paid) employees, payment for eligible unused sick time will be payable in your final paycheck if your last day worked was on or before the 15th of the month. If your last day worked was after the 15th of the month, the eligible unused days will be payable in a separate payment processed in the subsequent pay period. Payout of eligible sick time within these timeframes is dependent on the termination processing date in Pitt Worx.
- For non-exempt (biweekly paid) employees, payment for eligible unused sick time will be payable in the staff member's final regular payment. Payout of eligible sick time within this timeframe is dependent on the termination processing date in Pitt Worx.

Note: Final payments will be made via the payment method that you had as of your last day of work. If you have direct deposit on file, your payment will be made via direct deposit. Refer to the Staff Handbook for additional information.

☐ **Personal Time Upon Separation***: You are not eligible to receive payment for unused personal time.