

## Separation Guide and Checklist for Staff

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

Employee Checklist		Completed
<b>General</b>		
<b>Resignation Letter</b>	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.	<input type="checkbox"/>
<b>PRISM TRKS</b>	Final timecard and any missing timecards must be submitted and approved in PRISM TRKS on your last working day. If you have supervisor responsibilities within PRISM TRKS, please make appropriate updates in the change manager section of the system to assign this responsibility to the appropriate person(s).	<input type="checkbox"/>
<b>Address Change</b>	Your final W-2 will be mailed to the mailing address on record at the time of your separation. Contact the payroll Department at 412-624-8070 with address changes that occur after your separation date.	<input type="checkbox"/>
<b>ID</b>	University ID and badges must be returned to your department administrator on or before your final working day.	<input type="checkbox"/>
<b>Return of University Property</b>	All University property: parking pass, keys, books, phones, computer equipment, etc. must be returned to the department administrator on or before your final working day.	<input type="checkbox"/>
<b>Access to Final Pay Advice</b>	Employee Self-Service becomes unavailable upon termination. Final pay statements are printed and mailed to the address on file. If you need copies of pay statements, please contact the Payroll Department at 412-624-8070 for assistance.	<input type="checkbox"/>
<b>Separation Interview</b>	Contact your Department Administrator to schedule a separation interview.	<input type="checkbox"/>
<b>Technology/Systems</b>		
<b>Phone</b>	Set up an out-of-office message on your University phone. Please see your department administrator for guidance on what should be included in the message.	<input type="checkbox"/>
<b>Email</b>	Set up an out-of-office message on your University email account. Please see 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, please notify your department administrator of your request prior to your retirement date. Your department must approve this request and notify HR if it is to be retained.	<input type="checkbox"/>
<b>University Files, Records and Emails</b>	University files, records and emails should be forwarded to your Department Supervisor or another 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 email 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.	<input type="checkbox"/>
<b>University Owned Mobile Phone Service Agreement</b>	Your phone should be returned to your departmental supervisor who will work with Telecom to transfer, deactivate, or suspend your current phone number.	<input type="checkbox"/>

<b>Personal Files, Records and Emails</b>	Personal files should be removed from all University-owned equipment prior to your final day of employment.	<input type="checkbox"/>
<b>Current Litigation</b>	If you have received a Litigation Hold Memorandum from the Office of General Counsel 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.	<input type="checkbox"/>

### Benefit Eligibility Upon Separation

**Benefits Plans** - Participation in the University'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.

<b>Medical, Dental, and Vision Plans</b>	Information concerning the continuation of coverage, according to federal regulations known as COBRA, will be sent to you automatically by Benefits Management Services (BMS), the University's third-party administrator. For questions about your COBRA coverage, please contact BMS at 1-888-499-6885.
<b>Life Insurance</b>	Life insurance coverage carries a conversion privilege which entitles you to change to 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 and Dismemberment insurance. For questions about your life insurance policies, contact Aetna at 1-800-523-5065.
<b>Disability (Short-Term and Long-Term)</b>	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.
<b>Flexible Spending Accounts</b>	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, contact UPMC at 1-888-499-6885.
<b>Long-Term Care</b>	You may 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 the coverage after your separation. For questions, contact Unum at 1-800-227-4165.

### Retirement Plans

<b>Defined Contribution Program</b>	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.  <b>TIAA</b> - 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 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.
<b>Noncontributory Defined Benefit Pension Plan</b>	For participants who terminate employment at any age other than retirement, and have participated in the plan for at least five vested years, your benefit will be held in a trust fund at Bank of New York Mellon until such time that you meet the requirements of normal retirement. For questions related to the Defined Benefit plan, you may contact the Pension Administration Center at 1-866-283-0208.

### Other Benefits

<b>Education Benefits</b>	For education benefits issued for a particular term or session to remain in force for the entire term or session, the staff member must remain employed in an eligible status as follows, subject to review with respect to end dates of the sessions.  Fall Term - Actively working on the last business day of October. Spring Term - Actively working on the last business day of February. Summer Term - Actively working on the last business day of June.
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<b>Credit Union</b>	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.
<b>Unemployment</b>	For Pennsylvania unemployment eligibility, please contact PA unemployment at 1-888-313-7284 or visit <a href="http://www.uc.pa.gov">www.uc.pa.gov</a> .

### General University Policy and Guidelines from the Staff Handbook

<b>Separation Date</b>	The official separation date is your last active working day. If you separate the day before a University Holiday, you are not eligible to be paid for that University Holiday.
<b>Payment for unused vacation time upon separation*</b>	You are eligible to receive payment for unused vacation time. Payment for unused accrued vacation time will be payable in a separate check processed in the subsequent pay period following the separation.
<b>Payment for unused sick time upon separation*</b>	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 above 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. Payment for unused accrued sick time will be payable in a separate check processed in the subsequent pay period following the separation.
<b>Personal Time upon separation*</b>	You are not eligible to receive payment for unused personal time.

*\*Staff Transfers are defined as having no break in service between two staff positions. If an employee is transferring to a new staff position, they will retain their time off balances. The balance at the time of transfer will be available to use in the new department.*