*Separation Information for Exiting Staff Members*

***Employee Responsibilities:***

- ✓ **Letter of Resignation:** An employee who resigns is expected to write a letter of resignation to the supervisor. A copy will be sent to Human Resources (HR) and Payroll. The letter should include the reason for leaving and the date of the last day of work.

- ✓ **University OneCard(s):** Employees who have a University-liability credit card (OneCard program) must return the card to the Office of Business Services prior to leaving the University. Arrange expense reimbursements for items such as mileage, lodging, board, or other business expenses or allowances that have not yet been paid. Any outstanding cash advances for expenses must be settled at this time. Access to the Commercial Credit Expense Reporting (CCER) system will not be available after your last day of work.

- ✓ **Business Meetings:** Cancel scheduled attendance at any upcoming meetings or seminars following the last day of work.

- ✓ **Work Transfer:** Prepare an outline of accountabilities, status of work in process, and major projects. Work with the departmental supervisor/manager to achieve a smooth transfer of duties. Transfer ownership of shared files to your manager.

- ✓ **Personal Accounts:** All personal accounts (e.g., GoldPLUS) that have been established on campus must be closed. If there are any outstanding balances due, these will be deducted from the final paycheck.

- ✓ **Property:** Return all Lehigh property (e.g., keys, laptops, mobile phones, tablets, other equipment, instruments, ID cards, parking hangtag, library books, etc.) to the home department. Be certain all university property, files/manuals are returned to appropriate locations.

- ✓ **Move Out of Office:** Clean and organize desk/work space prior to leaving the University. Remove any personal objects as well as any personal documents and files from the desktop computer, as applicable.

- ✓ **Change of Address:** Inform HR and Payroll of all address changes using Connect Lehigh Employee Self Service or the Personnel Change Form. This ensures that applicable COBRA information as well as W-2 information mailed to the individual's home will be received. Keeping the address on file current also allows the University to contact the individual, if necessary.

- ✓ **Email:** Forward action items in email to person(s) designated by your supervisor. Discuss with supervisor whether a notification message should be posted as an auto- response to incoming mail. Delete personal email. Alumni staff members who wish to keep the Lehigh email ID must contact Alumni Relations in the Development office.

*Benefits Issues and Terms*

- ✓ **Separation Date:** The separation date is the last day that the employee is actually at the work site and performing meaningful work. This is also referred to as last day worked (LDW).

- ✓ **Medical/Dental Benefits:** Benefits will end on the last day of the month that includes the separation date. Departing employees may be eligible to continue health insurance coverage through COBRA for up to 18 months by paying the full premium plus an administrative fee. Eligible employees will be sent a certified letter from Benefitfocus with a form that can be used to enroll in continued coverage. Coverage through COBRA is always retroactive to the first day of the month following separation (eligibility date), regardless of the notification date, providing election is made within the deadline provided in the notification letter.

- ✓ **Flexible Spending Accounts:** If the departing employee contributes to a Health Care and/or Dependent Care FSA, contributions from pay will cease at the end of the month that includes the separation date. The employee will be offered an opportunity to continue making after-tax contributions to the Health Care FSA account by Benefitfocus under COBRA.
- ✓ If the employee decides not to continue account contributions under COBRA, he/she will be able to submit qualifying charges for dates of service that occur prior to the end of the month that includes the separation date. Submissions must be made within 90 days following the end of the Plan Year.
- ✓ If the employee decides to continue account contributions under COBRA, he/she will be sending after-tax contributions to his/her account. However, the departing employee will also extend the number of months (up to December 31st) for which FSA claims can be submitted.
- ✓ The invitation to continue Health Care FSA contributions under COBRA will come in the same mailing as the medical coverage COBRA application if the departing employee was enrolled in University medical coverage; and by itself if he/she did not participate in a Lehigh medical plan.
- ✓ Continuation of after-tax contributions to a Dependent Care FSA account is not available following the end of employment. The departing employee will have 90 days following the end of the Plan Year that includes his/her separation date to request reimbursements up to the total amount of funds contributed for dates of service that occur prior to the end of the month that includes the separation date.

- ✓ **Disability Insurance:** Eligibility for all disability insurance (long term and short term) will cease on the departing employee's last day of work.

- ✓ **Life Insurance:** Staff members and/or their dependents are covered by any group term life insurance in which they are enrolled until the last day of the month that includes the separation date. This life insurance may be converted to an individual life insurance policy by using the conversion form that will be mailed to them along with a quote directly from the carrier, Lincoln Financial Group. The employee will have up to 30 days to elect to convert the coverage.

- ✓ **University Retirement Plan:** An employee hired prior to January 1, 2014 is fully vested in any retirement plan contracts he/she may own. An employee hired on or after January 1, 2014, will be fully vested after three years of service. Information about account options can be obtained by contacting the **Teachers Insurance and Annuity Association** (TIAA) at 1-800-842-2776. The retirement account does not have to be closed; the departing employee may choose to maintain the TIAA account and receive annuity income upon retirement.

- ✓ **Voluntary 403(b) Retirement Savings Plan (VRSP):** The employee is always the owner of any VRSP account he/she opens. Funds committed to a 403(b) account can be withdrawn only under specific circumstances described in the federal tax code. A departing employee may be able to withdraw funds because termination constitutes a break in service; however, consultation with a personal tax advisor about the possible tax consequences and withdrawal alternatives is recommended.

- ✓ **Tuition Benefits:** Tuition benefits for courses still in progress remain valid until the end of the semester during which the separation of employment occurs, assuming the employee originally expected to be employed throughout the semester.
  **Note: Employees with planned mid-semester resignations are not eligible for tuition benefits*

***Payroll Issues:***

- ✓ **Final Paycheck:** Payroll will prepare the final pay for time worked (this does not include your vacation payout) and mail it to the home address on record. It will include payment for all time worked through the separation date. **If money is owed to the University due to various account charges (e.g., outstanding parking tickets), or to overpayment of benefits resulting from the timing of the separation, the amount due will be deducted from the final pay.** If sufficient notice was not provided to allow for accurate payroll information, or the final pay is not sufficient to meet the necessary deductions, the departing employee will be billed for the remaining balance or it may be deducted from the accrued vacation payout.

- ✓ **Payroll Deductions:** All authorized payroll deductions for United Way, U.S. Savings Bonds, Liberty Mutual Insurance, and/or other optional deductions will stop with separation of employment. Departing employees need to contact Liberty Mutual to arrange continued premium payment on personal insurance policies, if applicable.

- ✓ **Payment for Accrued Unused Vacation:** The University will provide a payment for any unused accrued vacation, up to the equivalent of what you receive for one year of service. This payment is issued in the form of a paper check (no direct deposit) on the next regular payroll cycle following the final salaried paycheck and will be mailed to the departing employee's home address.

  **Note: If the departing employee took vacation time in excess of the amount earned prior to the separation date, the excess vacation value will be deducted from the final paycheck.*

*Other Issues:*

- ✓ **Computer Accounts and Files:** Access to University computer systems terminates with separation. Voicemail password will be reset and not accessible after the separation date. Prior to separation date, give your supervisor access to any computer files or software applications that require special passwords (other than your Lehigh username/password). Transfer ownership of Google docs. LTS information regarding leaving Lehigh: https://confluence.cc.lehigh.edu/display/LKB/Leaving+Lehigh

- ✓ **Exit Interview:** Human Resources will contact the employee upon notification of a separation. The purpose of the interview is to address any questions, comments, or concerns and to seek input for continuous improvement in employment at Lehigh University.

- ✓ **Future References:** An employment verification for Lehigh employment can be verified by www.theworknumber.com. The Lehigh employer code is 19163.

**If there are any questions regarding the above information, please contact HR at extension 83900.**