

– LEAVING LEHIGH –
SEPARATION INFORMATION FOR 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.
- Expense Reports and Reimbursements:** 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.
- University Credit Card(s):** Employees who have a JP Morgan Chase Visa card through the University must return the card to the Office of Finance and Administration prior to leaving the University. If in possession of a Purchase card, return it to the supervisor.
- Business Meetings:** Cancel scheduled attendance at any upcoming meetings or seminars.
- 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.
- Personal Accounts:** All personal accounts (e.g., GoldPLUS, SMART Parking Cards) 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 issued property (e.g., keys, library books, equipment, instruments, ID cards, parking hangtag, 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 or Payroll of all address changes. 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.

Benefits Issues

- 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 **Ceridian** 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 Ceridian 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 of the account's closing date.

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 month 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 can be requested from Human Resources.

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- University Retirement Plan:** The employee is fully vested in any retirement plan contracts he/she may own. Information about account options can be obtained by contacting the **Teachers Insurance and Annuity Association–College Retirement Equities Fund (TIAA-CREF)** at 1-800-842-2776. The retirement account does not have to be closed; the departing employee may choose to maintain the TIAA-CREF 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.

Payroll Issues:

- Final Paycheck:** Upon receipt of proper documentation, including a time sheet, Payroll will prepare the final paycheck and mail it to the home address of 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 payment.** If sufficient notice was not provided to allow for accurate payroll information or the final paycheck 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 automobile and/or homeowner's insurance policies, if applicable.
- Payment for Accrued Unused Vacation:** Vacation is prorated and the University will provide a lump sum payment for unused accrued vacation up to one year's worth of vacation.. 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 of record. Standard tax deductions will be applied and any charges to personal accounts that were not processed in the final salaried paycheck will be deducted.

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.

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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. If the departing employee is a retiree, faculty spouse/ partner of faculty, or a Lehigh alumnus, A NEW Lehigh email account will be issued. 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).
- 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:** A signed authorization is required if the departing employee wishes to allow the University to release information about his/her employment at Lehigh for future reference checks (e.g., other prospective employers). The *Request for Reference and Release* authorization form is available on the HR website [<http://www.lehigh.edu/~inhro/forms.html>] – see “Leaving Lehigh”].

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