

SEPARATION GUIDELINES FOR EMPLOYEES

✓	ACTIVITY	TIMEFRAME	OUTCOME
	**Resolve any outstanding PASSHE debts, including payroll debts	As Soon As Possible	If you terminate with a debt owed to PASSHE, final payment and retirement processing will be delayed .
	Contact the State Employee's Retirement System (SERS), Alternative Retirement Plan (ARP) vendor or PSERS to discuss retirement options with a counselor. Counseling session dates can be found on the H.R. website .	Several Months in Advance	Although not required in advance, the more notice you provide, the more likely your retirement will be processed timely.
	Schedule an appointment with your retirement plan counselor to sign retirement or annuity documents.	As Soon as You Determine a Specific Date	If a SERS participant, your "official" notification that provides your number of Creditable Years for Retirement will be forwarded by SERS to your University HR Office. For ARP or PSERS participants, your university HR office will determine if you are eligible for a sick leave payment. Any eligible sick leave payout will not be processed until proper documentation of retirement annuity is received. Delay of documentation will delay sick leave payouts.
	If applicable, and you wish to have a portion of your leave payment deposited into Deferred Compensation, consult your HR Office for an estimate of quota payout, then contact Great West (1-866-737-7457 or www.sers457.com). Counseling session dates can be found on the H.R. website .	As Soon As Possible	NOTE: You must already be enrolled in Deferred Compensation in order to defer your leave payout. Be proactive and coordinate any issues between Great West and your Human Resource Office. Any delay in this process could make you ineligible to defer the payment under IRS regulations.
	Submit a signed resignation letter addressed to your supervisor indicating the effective date of your separation Faculty should submit to President's Office. Provide a copy to your Human Resources office.	At a Minimum Two Weeks in Advance	Although not required in advance, the more notice you provide, the more likely that all monies due you from PASSHE will be paid timely and your retirement payments released.
	Submit all leave requests before your last day of employment.	As Soon As Possible	If this activity does not occur, it will delay your leave payment and notification to retirement that all retirement covered earnings have been paid.
	Follow any additional university termination requirements and policies, such as the return of PASSHE property (i.e. keys, cell phones, laptops, uniforms, credit cards, etc.)	University Specific Dates	Depending upon the requirement or policy, failure to comply could delay both your final payments from PASSHE and your retirement payments.
<p>ADDITIONAL INFORMATION:</p> <ul style="list-style-type: none"> ➤ If any of your final leave balances (quotas) are negative, it will delay your final payment and retirement processing. ➤ If you have a conversion pay liability, it will be recovered from your final payment or any other monies you are due. ➤ Great West will not release any of your deferred compensation monies until your retirement has been processed. ➤ SERS "Leaving Active Employment" website: http://www.sers.pa.gov/members-leave-state-employment.aspx ➤ Delays identified above may result in an initial two-week delay of payment, with subsequent additional two-week delays occurring until issued are resolved. <p>**If you have a debt to PASSHE when you separate, PASSHE will make every effort to recover the debt from any monies that you are due. If your outstanding debt cannot be recovered from your final pay, we will recover the monies from your SERS retirement account if applicable which will delay your retirement annuity processing. This requires your authorization (signature) or the authorization of your university legal counsel. For ARP and PSERS participants a bill will be sent to you and legal actions will be taken to recover any monies due PASSHE.</p>			