When People Leave Mason
As we head to the end of the academic year, we know some of our faculty and staff will leave Mason (although we hope that number is really low!). We want to help make the transition as smooth and easy as possible. We also want to be sure the process is in compliance with federal and state rules. To that end, we thought it would be helpful to provide some information, checklists, and sample forms regarding the separation process for faculty and staff to you, our HR liaisons, so you can help us proceed properly. This is not a comprehensive list as your department may have additional procedures for handling separations. However, we hope it will be of assistance in helping you manage the process.

What is a Separation?
A separation is when someone leaves employment at Mason. If an employee changes positions at Mason, they are not processed as a separation. Sometimes we receive resignation letters from employees who are actually just transferring to another Mason position. If you are sending over a resignation letter for someone who is leaving the position but not Mason, please be sure to indicate the employee is staying with the University in a different capacity. If you also know that the individual will be transferring from Mason to another state agency, please indicate this on the separation form. This will help us avoid erroneously removing your employee from the payroll and/or benefits systems when they are not leaving state service.

Separation Forms
Separation forms for faculty and classified staff can be found on the HR & Payroll website (links to the forms are below). The forms can be completed online, then printed out for signatures. Please provide the employee's reason for separation by clicking on the box next to the word "resign" and selecting the appropriate reason from the drop-down menu. Entering this information is important as we use it to develop retention programs and strategies. If you have any questions on which reason to use, please contact:

For faculty: Megan Kirk at 3.3551 or via email at mkirk4@gmu.edu / Michelle Lim at 3.3665 or via email at mlim1@gmu.edu

For classified: Lauren Lambert at 3.9459 or via email at llamber5@gmu.edu

Links to the forms:
1. Faculty Separation Form
2. Classified Separation Form

The Separation Process: Steps to Take
Below please find the steps liaisons, supervisors and/or managers should follow when separating an employee from Mason.

1. Once you have received the formal resignation letter from the employee, please forward it along with either the faculty separation form or the classified separation form to HR & Payroll at MS 3C3. We suggest sending this information as soon as you learn of the employee’s plan to depart the University. The sooner we receive this information, the sooner we are able to process the paperwork.
to ensure both a smooth transition for the employee regarding pay and benefits and a smooth transition for the department and the University, avoiding overpayment and other potential miscommunication.

2. Send an Exit Alert to us at exitalrt@gmu.edu. Please note the email address is correct although the spelling is not. Your e-mail should contain the following information:
   * Your name, department, and phone number
   * The name of the separating employee, their G#, position number, and their last date of work
Please remember that the Exit Alert e-mail does not substitute for the need to send the appropriate paperwork to HR & Payroll including the faculty or classified separation form and the formal resignation letter. However, an early alert does help us prevent overpayments.

3. As part of the exit process, the employee will also receive an exit packet which includes pertinent COBRA insurance information. To ensure receipt of this information, please encourage the separating employee to verify or update their forwarding address information in Banner Employee Self Service (ESS). To add or edit an address, log into ESS at https://patriotweb.gmu.edu/ and select:
   * Personal Information
   * Update address(es) and phone(s)
   * Click on the link(s) "current" (for addresses)
   * Make your additions/changes
   * Click on "submit"
Separating faculty and staff should continue to have an active address in Banner. Do not deactivate their permanent address as we will continue to need it to send various correspondence such as their last paycheck, etc.

4. Please remind any separating faculty and staff that 2015 W-2 forms will be available on Employee Self Service (ESS) in January 2016, and they should keep their ESS login information secure and available so they have it handy when they need it. We will not mail a paper W-2 for 2015 unless one is specifically requested.

5. In addition to maintaining an updated address in Banner (i.e. PatriotWeb), please also request that separating employees update (if necessary) their address in Employee Direct which houses the Commonwealth's health insurance and flexible benefits information for employees.

6. There are a number of outstanding issues that need to be wrapped up when someone separates from your unit. To help keep track of the process, there are three different forms -- one for the faculty or staff member, one for the supervisor, and one to track the return of equipment and property. You can also find the forms on our Exit Process main page. The Exit Process pages can be very helpful in ensuring that your separating employees, including Postdocs and graduate assistants, touch base on an array of issues associated with their departure including things that impact most every departing employee such as:
   · university equipment
   · building access
   · parking passes
   · library materials

as well as those issues that impact benefits eligible employees such as:
   · leave payout (where applicable)
   · benefits
7. The release of any lump sum due to the employee from such things as leave payouts, comp time, overtime, deferred pay, etc., needs to be addressed prior to the start of the last pay period before the employee's end date. If the employee wants to roll the lump sum due to them into a 403(b) retirement account, a **one-time salary reduction form** must be completed, signed, and returned to HR & Payroll prior to their last day. If they would like to roll the lump sum into a 457 account, please have them complete the **VRS One-Time Deferral form** and return it to HR & Payroll prior to their last day.

8. If you have a faculty member who is separating and has sponsored funding, please ask them to complete a **Sponsored Programs Exit Form** and submit it to the Office of Sponsored Programs (OSP) as soon as possible prior to their last day at Mason. This will allow OSP to assist with the transfer or closeout of their sponsored project. You can also find the form online on our **Exit Process main page**.

Please don't hesitate to contact our Customer Service Center at 3.2600 if you have any questions. Our Customer Service Center is staffed every day from 8:30am - 5:00pm. Should you receive a recording when you call during regular business hours, it means all of our four incoming lines are in use. We hope you will try again in a few minutes.

**Exit Interviews**

When separating faculty and staff provide us with feedback about their experiences here at Mason as well as their reasons for leaving, we can look for themes that can help us improve overall recruitment and retention. Exit interviews may be completed in one of three ways; online, via paper form, or in person. A brief and confidential survey can be found online at [http://exitsurvey.gmu.edu/](http://exitsurvey.gmu.edu/). A paper exit interview form is included in the exit packet that goes out to every separating employee and can also be found on our **Exit Process main page** in either a .doc or .pdf format. You may contact the Employee Relations team at 3.3878 if you would prefer to schedule a one-on-one confidential in-person exit interview.

**Special Notes on 9-Month Faculty Members Who Separate**

If you have a faculty member separating in May who is on deferred pay (9-months paid over 12 months), please advise them that their final check will be larger than usual because it will include all the money in their deferred pay bucket. Please suggest that they contact a Benefits Administrator in HR & Payroll if they would like to have their final check moved to a Tax Sheltered Annuity (TSA). Certain contribution limitations apply. You can refer to the Benefits web page at [http://hr.gmu.edu/benefits/retire/supplemental.php](http://hr.gmu.edu/benefits/retire/supplemental.php) for details.

Please notify HR & Payroll about any end-of-the-academic-year separations (both 9-months paid over 9 months and 9-months paid over 12 months) as soon as possible. It's important to ensure that all of your separating 9-month faculty have designated whether or not they elect to have summer health coverage. **If we do not hear from a faculty member that they would like to terminate health coverage by 5/24/15, their coverage will continue through August 31, 2015.**

**Notes For Mason Retirees**

Mason welcomes having Mason retirees stay connected to the university in whatever ways work for them – participant, volunteer, mentor, employee. However, there are some conditions for post-retirement employment at Mason such as:

- You must complete a bona fide break in service and can only return to Mason in a part-time capacity.
The bona fide break must be a minimum of one full calendar month from the effective date of retirement over a period that you would normally work. Periods of leave with or without pay do not count toward the bona fide break. For faculty members, summer break, intersession periods, educational leave and sabbaticals also do not count toward the break therefore 9-month faculty who retire at the end of the academic year cannot work during the summer after they retire.

- You must return to a non-covered (e.g. part-time) position. You cannot have the same duties or hours that you worked before retiring.

- You cannot pre-arrange your return prior to retirement.

**Wage Position Topics**

As summer arrives, please keep in mind that the status of your student wage workers may have to change. If your student wage (SW) workers continue in their positions after graduation, they will need to be moved from a SW to a regular non-student wage (WG) position via an electronic approval (EPAF). You should then terminate the SW position. Students in a degree program who are returning for the fall semester can remain in the SW position over the summer. Additionally, remember to put a job end date in place for the new assignment when possible. If a job end date isn't possible, please create a termination EPAF once the employee has stopped working. If this is not done, the wage employee's position will continue to appear active in Banner.

Thanks so much for helping us out on this one as it can be an audit issue. As a safeguard, student wage and non-student wage assignments will be automatically terminated after five months of inactivity.

If you have any questions, please contact Jennifer Irvin at 3.2616 or via email at jirvin@gmu.edu.

**A Reminder on GRA / GTA / Adjunct Positions**

Please remember that if you have a Graduate Teaching / Research Assistant and/or Adjunct in which the incumbent has resigned or ended employment prior to the original end date, an early termination EPAF should be completed. If an overpayment occurs, you will need to notify HR & Payroll as soon as possible as well as alert the impacted former employee.

**Do You Have 9-Month Faculty Who are Timesheet Approvers?**

Timesheet approval reminder emails will not be generated over the summer for 9-month faculty on a 9 month pay schedule (9 paid 9). If you have 9 paid 9 faculty members who are also timesheet approvers, please ask them to designate a timesheet proxy for the summer (SM 11-16)(26-12 to 26-18). A designated proxy will be able to approve timesheets throughout the summer and ensure employees are paid.

Instructions for setting up a timesheet approver proxy are on the Payroll site under the timesheets tab or directly at [Creating a Proxy](#).