When People Leave Mason
As we head to the end of the academic year, we know that 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 that the process is in compliance with federal and state rules. To that end, we thought it might be helpful to provide some information, checklists, and sample forms regarding the separation process for faculty and staff to you, our HR liaisons, so that 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 position. If you are sending over a resignation letter for someone who is leaving their position but not Mason, please be sure to indicate that the employee is staying with the university in a different capacity. This will help us avoid erroneously removing your employee from the benefits system when they are not leaving.

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: Michelle Lim at 3.3665 or via email at mlim1@gmu.edu / Megan Kirk at 3.3551 or via email at mkirk4@gmu.edu
For classified: Jennifer Irvin at 3.2616 or via email at jirvin@gmu.edu / Ian Reynolds at 3.2659 or via email at ireynol1@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 that 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. In the case of academic units, send it to the Office of the Provost for initial processing. They will then send it to HR & Payroll. 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. In order 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 them various correspondence including such things as their last paycheck, etc.

4. Please remind any separating faculty and staff that 2013 W-2 forms will be available on Employee Self Service (ESS) in January 2014 and that they should jot down their ESS login information so they have it handy when they need it. We will not mail a paper W-2 for 2013 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.

Additionally, please have them update their address with those companies which administer our retirement plans (VRS or ORP), tax deferred annuity plans (TSAs), deferred compensation, and other miscellaneous benefits such as savings bonds as they must be notified separately by the employee. You can refer to the HR & Payroll Benefits website at http://hr.gmu.edu/benefits/retire/tsa-providers.php to find web links and contact information for these companies.
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 under "Check Out Sheets." 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
- retirement (including roll-overs)

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 retirement account (i.e. 403(b) ), a one-time salary reduction form must be completed, signed, and returned 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 that 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/. 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 a .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 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 they wish.

If we do not hear from the faculty member that they would like to have coverage continue through August, their health coverage will end on May 31, 2013.

**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 on 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 Kevin Ford at 3.4282 or Sarah Hendrix at 3.2630.

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

Please remember that if you have a Graduate Teaching / Research Assignment 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.

**Do You Have 9-Month Faculty Who are Leaving Mason for the Summer?**

For 9 month faculty who are timesheet approvers and who are not going to be in the area over the summer, it would be a good idea to have them designate a timesheet proxy. A designated proxy will be able to approve timesheets in their absence 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.

Lastly, the 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 are 9 paid 9 and wish to continue to
receive the timesheet reminder emails over the summer, please email us by May 24, 2013 at payroll@gmu.edu so that your request can be processed.