

## Separation Checklist for Employees

Employee name:	
Employee number:	
Position:	
Supervisor/manager:	
Date of employee separation:	

√	ACTIVITY	TIMEFRAME	OUTCOME
	Resolve any outstanding commonwealth debts, including payroll debts.* This may include, but is not limited to compensation paid, but not yet earned, travel/salary advances, balances on corporate credit cards, and negative leave balances.	As soon as possible	If you terminate with a debt owed to the commonwealth, final payment and retirement processing may be delayed.
	Contact the State Employees' Retirement System (SERS) at 1.800.633.5461 to discuss retirement options with a counselor.	Several months in advance	Although not required in advance, the more notice you provide, the more likely your retirement will be processed timely.
	If you are retiring, schedule an appointment with your retirement counselor to sign retirement documents. NOTE: You must retire with the qualifying years of service and/or age to be eligible for a sick leave payout. If you choose to vest, you will not be eligible for a sick leave payout.	30 to 45 days	SERS recommends that you sign your retirement documents 30-45 days prior to your retirement date. If you do not and you qualify for a sick leave payout, sick leave payouts will not be paid until the HR Service Center (or your HR Office if your agency is not part of the HR Service Center) receives official notification of your requirement from SERS.
	If you wish to have a portion of your leave payment deposited into Deferred Compensation, consult your HR office of an estimate of quota payout, and then contact Empower Retirement (toll free 866.737.7457, Harrisburg office 717.901.3590 or <a href="http://www.sers457.com">www.sers457.com</a> ). Be careful not to overestimate your leave payout amount. If you do overestimate, the amount you designate will be taken, and may include funds from your final pay.	45 days in advance	Be proactive and coordinate any issues between Empower Retirement and your HR office. You must submit a signed Paycheck Contribution Election form to Empower Retirement 45 days before your retirement date. Any delay in this process could make you ineligible to defer the payment under IRS regulations. NOTE: You must already be enrolled in Deferred Compensation in order to defer your leave payout.
	Submit a signed resignation letter addressed to the agency head indicating the effective date of your separation and provide a copy to your supervisor/manager.	At least two weeks in advance	The effective date must be your last day worked or on leave. The more notice you provide, the more likely that all monies due to you from the commonwealth will be paid timely and your retirement payments released.
	Submit all leave requests and enter all attendances (additional hours worked such as overtime) on or before your last day of employment. Notify your supervisor when your time entry is completed so that your supervisor can approve it prior to the close of business on your last day.	As soon as possible on the last day worked	Your supervisor must approve all of your absences and attendances prior to the close of business on your last day. If it is not entered and approved, it will delay your leave payment and notification to SERS that all retirement covered earnings have been paid.
	Work with your supervisor/manager and agency Records Coordinator to ensure all paper records are maintained, labelled, organized, and appropriately disposed of. Obtain the approval of your supervisor/manager if you wish to copy or remove any files for personal use.	As soon as possible, but before your final day of employment.	By completing this review, the agency ensures continuity of operations and proper disposition of agency records. Failure to comply could delay both your final payment from the commonwealth and your retirement payments.

✓	ACTIVITY	TIMEFRAME	OUTCOME
	Work with your supervisor/manager, IT staff, and/or agency Records Coordinator to activate appropriate email and voicemail messages advising as to future contact information for the program, organize all electronic files, move electronic files to the supervisor/manager's folder or other agency-designated folder, appropriately dispose of electronic files, and obtain the approval of your supervisor/manager if you wish to copy or remove any files for personal use.	As soon as possible, but before your final day of employment.	By completing this review, the agency ensures continuity of operations and proper disposition of agency records.
	Work with your supervisor/manager to review and complete the <a href="#">Records Management Inventory: Employee Separation form</a> found in Manual 210.1 Employee Records Management Manual.	As soon as possible, but before your final day of employment	By completing the <a href="#">Records Management Inventory: Employee Separation form</a> , the agency documents that its records have been properly disposed of.
	For departing Senior Management Employees (agency heads, deputy secretaries or equivalent, chief counsels, bureau directors or equivalent and member of boards or commissions), work with agency Office of Chief Counsel and Senior Management Employee to complete the tasks listed on the Form for Agency Chief Counsel Regarding Departure of Senior Management Employees.	At least five (5) business days prior to your departure if you are a Senior Management Employee	By completing the Form for Agency Chief Counsel Regarding Departure of Senior Management Employees, the agency documents that its records have been properly disposed of.
	Provide to your supervisor/manager all Commonwealth property in your possession including but not limited to: <ul style="list-style-type: none"> <li>• Badges, I.D.s, credentials, and business cards</li> <li>• Keys</li> <li>• I.T. equipment such as laptops, tablets, cell phones, and radios</li> <li>• Uniforms</li> <li>• Credit cards</li> <li>• State car</li> </ul>	As soon as possible, but before your final day of employment	Returning Commonwealth property ensures the security and integrity of Commonwealth resources. Failure to comply could delay both your final payment from the commonwealth and your retirement payments.
	Provide your supervisor/manager a copy of this completed Separation Checklist for Employees.	As soon as possible, but before your final day of employment	Complying with the requirements in this Separation Checklist for Employees ensures the timely final payment and retirement benefit processing, continuity of operations, and the security and integrity of Commonwealth resources.

**ADDITIONAL INFORMATION:**

- If any of your final leave balances (quotas) are negative, it will affect your final payment and may delay retirement processing.
- If you have a conversion pay liability, it will be recovered from your final payment or from any other monies you are due.
- Empower Retirement will not release any of your deferred compensation monies until your retirement has been processed.
- SERS Active Members – Preparing to Retire/Leave State Service website: [www.sers.pa.gov](http://www.sers.pa.gov) contains important information.
- Delays identified above may result in an initial two-week delay of payment, with subsequent additional two-week delays occurring until issues are resolved.
- If you are required to file Financial Disclosure for the current year, you are strongly encouraged to complete and submit your forms prior to separation. If you are required to file this year, you may also be required to complete and submit Financial Disclosure forms the year following your separation.

\*If you have a debt to the commonwealth when you separate, the commonwealth will make every effort to recover the debt from any monies due. If your outstanding debt cannot be recovered from or is greater than your final pay, monies will be recovered from your retirement account and this will delay your retirement annuity processing. This requires your authorization (signature) or the authorization of your agency legal office. Please contact the Bureau of Commonwealth Payroll Operations at 717.783.8432 for the employee retirement debt recovery authorization form. Otherwise, authorization will be requested from your legal office and this recovery effort will delay your final payment and retirement processing.

This completed checklist must be provided to your supervisor/manager on or before your final day of employment. Any activities that were not completed prior to your final day of employment should be noted and justified.

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Employee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Supervisor/manager

\_\_\_\_\_  
Date received by Supervisor/Manager