

Prior Service Credit Request Faculty and Staff Retirement Plan

Use this form if you wish to have prior service at another college or university considered toward your vesting service under The Carnegie Mellon University Faculty and Staff Retirement Plan (the "Plan"). If your prior service meets the Plan's requirements, the period required for vesting may be reduced or eliminated. Generally, prior service credit is granted for service performed at another institution of higher education if such prior service would have been credited under the Plan if it had been performed for Carnegie Mellon. Refer to the Plan document for additional information regarding vesting and service credits.

Please provide contact information for the individual at the college or university who is authorized to verify your prior years of eligible service (typically an HR/benefits department):

Name of Institution: _____

Contact Person: _____

Address: _____

City, State, Zip: _____

Phone No.: _____ Fax No.: _____

Email Address: _____

Date of eligible service: _____

Circle One: Faculty Staff

A letter from Carnegie Mellon's Benefits Department will be sent to the contact above requesting information about your prior years of service. Once evaluated, if such prior years of service are to be credited, your information will be updated in Carnegie Mellon's Benefits System. You will be notified via e-mail of the amount of prior service credit received or of any decision not to extend prior service credit for service that does not meet the Plan's requirements.

By your signature below, you authorize Carnegie Mellon University to contact your previous employer to obtain necessary information related to your service:

PRINT NAME

Last Four Digits of SSN

SIGNATURE

DATE

OFFICE USE ONLY

Approved Years of Service Credit: _____ Vesting Date (if applicable): _____

Not Approved Reason: _____

Signature of Benefits Representative: _____

Signature of Supervisor: _____

Date Employee was Notified: _____ Date of System Update: _____