

# Carnegie Mellon University

## Human Resources

### Prior Service Credit Request Form

Use this form if you wish to have prior service at another non-profit college or university considered toward your vesting service under either the Carnegie Mellon University Faculty and Staff Retirement Plan or the Carnegie Mellon University 401(k) Plan. Participation in another non-profit college or university's retirement plan may reduce or eliminate the vesting period if you worked at the other employer within five years before employment at CMU. Refer to the plan documents for additional information regarding vesting and service credits.

*Please provide contact information for the individual at your prior employer 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: \_\_\_\_\_ Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

Dates of eligible service: \_\_\_\_\_

Circle One:    Faculty                  Staff

***A letter from Carnegie Mellon's Office of Human Resources will be sent to the contact above requesting information about your prior years of service.*** Once evaluated, you will be notified via email 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 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

\_\_\_\_\_  
Andrew ID

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

**Fax to 412-268-7068, or scan and email the completed and signed document to: [vjd@andrew.cmu.edu](mailto:vjd@andrew.cmu.edu).**

#### **BENEFITS OFFICE USE ONLY**

Approved    Years of Service Credit: \_\_\_\_\_

Not Approved    Reason: \_\_\_\_\_

Signature of Benefits Representative: \_\_\_\_\_

Signature of Supervisor: \_\_\_\_\_

Date Employee was Notified: \_\_\_\_\_