

## Status and Privileges of Retired Faculty and Staff and Surviving Spouses and Children

### **POLICY IV.3.1**

Volume IV, Human Resources

Chapter 3, Benefits

Issuing Office: Human Resource Services

Responsible Officer: Executive VP & Treasurer

Responsible Office: Human Resource Services

Originally Issued: May 10, 1971

Most Recently Revised: May 1, 2002

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### **Statement of Policy**

Purdue University provides benefits for faculty and staff who are official retirees.

The University also provides benefits to qualifying surviving spouses and qualifying children of deceased Purdue faculty and staff.

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### **Reason for Policy**

This policy explains the benefits provided to official retirees and to qualifying surviving spouses and qualifying children of deceased faculty and staff.

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### **Who Should Know This Policy**

- President
- Provost
- Chancellors
- Vice Presidents
- Deans
- Directors/Department Heads/Chairs
- Retirees
- Human Resources Staff
- Business Office Staff
- Faculty
- Administrative and Professional Staff
- Clerical and Service Staff
- Continuing Lecturers
- Supervisors

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### **Related Documents**

- Executive Memorandum No. B-35:  
Status and Privileges of Retired Staff Members and Widows/Widowers of Deceased Staff Members
- Executive Memorandum No. C-7:  
Fees for Staff, Spouses of Staff, and Children of Staff Registering as Students in the University

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## Contacts

Policy Clarification:

- West Lafayette Campus:
- Human Resource Services – Staff Benefits Team (765) 494-1694
- Calumet Campus Human Resources Department (219) 989-2254  
Fort Wayne Campus Human Resources Department (260) 481-6677  
North Central Campus Human Resources Department (219) 785-5300

Special Situations/Exceptions:

- All Campuses Director of Human Resource Services (765) 494-7395

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### **Definitions**

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#### Official Retiree

A faculty or staff member age 55 or more:

1. Who was employed by Purdue University in a benefits-eligible position for 10 or more years *and*
2. Whose age plus years of Purdue employment equaled or exceeded 70 at the time of retirement.

All accrued vacation paid at retirement counts toward satisfaction of the employment requirement. In addition, members of the clerical and service staffs may count all accrued sick leave at retirement toward satisfaction of the employment requirement.

#### **Or**

A faculty or staff member who:

1. Participated in one of the University retirement plans (TIAA-CREF, PERF, or Civil Service)
2. Received benefits under the University's long term disability program (LTD) until the age limit at which LTD benefits terminated, *and*
3. Was continuously employed with the University for five years or more prior to qualifying for LTD.

(Continued)

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### Definitions, continued

Qualifying Surviving Spouse,  
Qualifying Children

The surviving spouse and surviving children of a person who:

1. Was a Purdue employee at the time of his or her death *and*
2. Had been continuously employed by the University for five or more years immediately prior to death.

**Or**

The surviving spouse and surviving children of a person who was an official retiree of the University.

Additionally, to be considered “qualifying” under this policy, surviving children must meet the requirements necessary to qualify as a dependent under the University’s medical plan.

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### Procedures

#### **Official Retiree**

Purdue University grants the following benefits and privileges to all official University retirees:

1. University contributions to the employee’s TIAA-CREF or Public Employees’ Retirement Fund (PERF) accounts on any terminal vacation pay the faculty or staff member receives.
2. Two months of health insurance coverage in the University-supported medical plan or one of the Medicare supplemental plans, whichever plan is applicable. The University will continue its contribution for two months following the employee’s retirement. Thereafter, retirees may participate by paying the full cost of the applicable plan.
3. Continued participation in the Group Life Insurance Plan to age 65 with the retiree paying the full cost. (Coverage under the Accidental Death and Dismemberment Insurance, Personal Accident Insurance, Dependent Life Insurance, Long and Short Term Disability Insurance, and employee-funded Flexible Spending Accounts terminates at retirement.)

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4. A personal identification card issued by the Department of Human Resource Services.
  5. A complimentary 'A' parking permit at the West Lafayette Campus or its equivalent at the regional campuses.
  6. Purchase of tickets to athletic, cultural, educational, and entertainment events at staff rates for retiree, spouse, and dependent children.
  7. Partial remission of fees for spouses and qualified children in accordance with the policies in Executive Memorandum No. C-7. This is contingent upon the staff member being domiciled in the state of Indiana at the time of official retirement.
  8. Use of University library facilities.
  9. Use of University recreational facilities at staff rates.
  10. Use of University electronic mail services.\*
  11. Use of data network remote access facilities (for example: dial-up, ADSL)\*

\* Policies governing the use of the facilities represented in privileges 10 and 11 above are identical to those that govern their use by University faculty and staff. These policies include, but are not limited to, the following:

Purdue grants access and use of computer facilities to each individual for University purposes only. Use of these facilities must be consistent with this purpose. All use is subject to external contracts, which impose strict requirements.

### **Qualifying Surviving Spouses and Qualifying Children**

Purdue University grants the following benefits and privileges to qualifying surviving spouses and qualifying children:

1. Continued participation in the University-supported medical plan or Medicare supplemental plan, whichever is applicable, with the surviving spouse paying the full cost. The insurance may be continued to the earliest of the following dates:
  - a. The date the surviving spouse fails to make any contributions when due
  - or*
  - b. The date the surviving spouse is covered by another group medical plan.

The insurance for qualifying children will terminate when the surviving spouse's insurance terminates. Remarriage will not terminate eligibility for the surviving spouse or children; however, new spouses will not be eligible for participation.

2. Partial remission of fees in accordance with the policies in Executive Memorandum No. C-7.
3. Use of University library facilities.

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Purdue University grants the following additional benefits to qualifying surviving spouses who have not remarried:

1. Continuance of a complimentary 'A' parking permit at the West Lafayette campus or its equivalent at the regional campuses if:
  - a. The deceased spouse was eligible for such a permit  
*and*
  - b. The surviving spouse is not employed by the University.
2. Personal identification card issued by the Department of Human Resource Services.
3. Purchase of tickets to athletic, cultural, educational, and entertainment events at staff rates.
4. Use of University recreational facilities at staff rates.

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## **History**

This policy supersedes **Executive Memorandum No. B-35**, which was originally issued May 17, 1975, and amended on October 15, 1985, October 23, 1986, November 10, 1995, and January 24, 2000.

Executive Memorandum No. B-35 superseded **Executive Memorandum No. B-23**, issued October 31, 1973.

Executive Memorandum No. B-23 superseded **Executive Memorandum A-303**, issued May 10, 1971.