



# IUPAT, FTI, LMCI EMPLOYEE HANDBOOK

Offices of the  
General President  
General Secretary-Treasurer  
&  
Fund Administrators

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# TABLE OF CONTENTS

Preface.....	2
Structure of the Union and Its Affiliated Funds.....	2
Office of the General President.....	3
Office of the General Secretary-Treasurer.....	4
Finishing Trades Institute .....	6
Labor Management Cooperation Initiative.....	7
IUPAT Industry Pension Fund .....	7
IUPAT Personnel Policies .....	8
Equal Employment Opportunity.....	8
Sexual Harassment.....	8
Complaint Procedure .....	9
Days and Hours of Work .....	9
Leave.....	12
Family and Medical Leave Act.....	13
Maryland Pregnancy Accommodation.....	13
Inclement Weather .....	13
Alcohol and Substance Abuse Policy .....	14
Dress Code .....	14
Smoking Policy.....	15
Evacuation Plan .....	15
Payroll Practices.....	15
Keeping Our Records Current .....	15
Termination and Discipline.....	16
Performance Evaluations .....	16
Personnel Files .....	16
Employment References and Recommendations .....	17
Benefits .....	17
Education Assistance .....	18
IUPAT Property and Usage .....	19
Work Stations.....	19
Supplies and Office Equipment .....	19

# PREFACE

This handbook has been prepared to provide employees with information regarding the International Union of Painters and Allied Trades (IUPAT), AFL- CIO Finishing Trades Institute (FTI), Labor Management Cooperation Initiative (LMCI) (collectively “the Employers”) and policies applicable to administrative and clerical employees working in the headquarters Campus at Hanover, Maryland. The Employers reserve the right, at any time, with or without notice, to modify, suspend or revoke any portion of this handbook. Final interpretation of the provisions of this handbook rests with the Employers. This handbook does not create a contract of employment, expressed or implied. The contract for bargaining unit employees is the Collective Bargaining Agreement (CBA) between the IUPAT, FTI, LMCI, and Painters and Allied Trades District Council 51. To the extent anything in this handbook conflicts with the CBA, the terms of the CBA govern for all covered employees. Employees not covered by the CBA are employees at will.

All employees should read and become familiar with the content of this handbook. We hope that you find this information helpful and will use it to assist you in performing your duties to the best of your abilities. You should keep a copy of this handbook at your desk for a quick reference.

Any questions regarding the employers’ policies should be directed to the IUPAT Executive Assistant to the General Secretary-Treasurer (EAGST), by sending an email to [Compliance@iupat.org](mailto:Compliance@iupat.org).

*The Employers’ expectations are simple: be productive, learn, grow, perform your duties as assigned and act in a professional manner.*

## STRUCTURE OF THE UNION AND ITS AFFILIATED FUNDS

IUPAT is governed by its Constitution, which may be amended at the General Convention, held every five years. Between conventions, the governing body of the IUPAT is the General Executive Board (GEB). The GEB consists of the General President, the General Secretary-Treasurer, and Regional and at Large General Vice-Presidents.

The FTI and LMCI are governed by their respective Agreements and Declaration of Trusts and by their own respective Boards of Trustees (BOT's). Each Board consists of an equal number of Union and Management Trustees.

## **OFFICE OF THE GENERAL PRESIDENT**

The General President is the principal executive and administrative officer of the IUPAT. The General President presides over the General Convention, which convenes every five years, and enforces the Constitution and the policies promulgated by the GEB. He has direction over all subordinate bodies of the IUPAT and is responsible for policing compliance by the subordinate bodies with the Constitution and International policies.

Persons employed in the office of the General President are involved in most of the major functions of the union. Some are summarized here.

**The Agreements Department** administers all National Agreements, and maintains copies of District Council and Local Union Agreements, as well as a data bank showing signatory contractors, fund contributions and mandatory clauses in all local agreements. It also files wage rates with the Department of Labor for its use in setting prevailing wages under the Davis-Bacon Act.

The Department also administers multi-union agreements, such as the General Presidents Project Maintenance Agreement, the National Maintenance Agreement, the Heavy and Highway Agreement, agreements held by the Metal Trades Department and Project Labor Agreements, and maintains data relating to these agreements.

Finally, the Department handles jurisdictional disputes with other trades and claims filed under the no raiding provisions of the AFL-CIO Constitution. It also maintains maps showing the geographic jurisdiction of IUPAT affiliates.

**Organizing:** The General Organizing Department tries to increase the membership of the IUPAT and bring the benefits of union membership to all workers performing jobs within the trades represented by the IUPAT.

**Government Affairs:** This office is responsible for the IUPAT legislative and regulatory program and it provides information on local and national issues affecting the IUPAT members to the membership. Department also conducts the IUPAT

political action program, which works to secure the election of candidates who support issues of concern to the IUPAT.

**Communications:** The Communications Department is responsible for the distribution of The Journal. The Journal is a publication designed to inform and update the IUPAT members on issues of importance to them and their families. The Director of Communications manages internal and external audience outreach. This includes media relations, speechwriting, web strategy and presentation development and ongoing social media campaign. The Director of Communications is also responsible for the development and creation of the union text messaging campaign and drafting official correspondence and other communication for the office of the General President of IUPAT.

**Job Corps:** Since 1969, the IUPAT has operated a Job Corps Program under contract with the U.S. Department of Labor. The program provides pre-apprenticeship training and job opportunities in the finishing industries for disadvantaged youth. Currently, the IUPAT operates 46 pre-apprenticeship programs at Job Corps centers throughout the United States.

## **OFFICE OF THE GENERAL SECRETARY-TREASURER**

The General Secretary-Treasurer (GST) receives and accounts for all revenues of the IUPAT. The GST preserves all important documents, papers, and accounts concerning the business of the IUPAT. The GST maintains the IUPAT membership records showing name, address, social security number, birth date, current status, death benefit classification and membership classification for each member. The GST receives all applications for District Council, Local Union and Conference charters and grants them when authorized by the GEB. The GST also is responsible for registering our union label with appropriate government agencies.

The major functions of the General Secretary-Treasurer's office are as follows:

**Accounting:** This office keeps track of monies billed, collected, loaned and spent; processes expense checks and payroll; arranges for bonding of the IUPAT affiliates. Accounting also coordinates with the Public Accounting Firm to ensure that the Audits, IRS Form 990s, and DOL Form LM-2 are completed timely and accurately.

**Bylaws:** This office drafts for GEB approval model Local Union and District Council bylaws and processes requests for approval of Local Union and District Council bylaws.

**Information Systems (IS):** The IS department strives to develop and implement advanced technologies to increase information accessibility and improve the business needs of the International Union of Painters and Allied Trades. The department provides support to the International staff, the affiliated funds, and as directed to district councils and local unions.

**Membership Services:** This office maintains membership records and histories, answers all incoming calls to the GST's office, classifies and files all correspondence, arranges for membership and other mass-mailings, retrieves historical information from microfilm and other archived records, coordinates the presentation of Gold Membership Awards and processes Life Membership transfers, along with mailing the life membership gold cards and certificates.

In addition, this office processes the District Council & Local Union monthly membership activity reports, processes clearance cards, membership applications and armed service cards. Along with updating the system with District Council and Local Union officer changes, this office also updates the IUPAT directory with officer changes and updates all member address changes, along with any returned mail corrections.

This office receives requests for and prints all official membership applications, member working cards and member ledger cards.

**Scholarships:** Receives scholarship applications and coordinates with the Committee to determine winners of each scholarship, sends correspondence to winners as well as copies to the committee members.

**Appeals, Charters, Mergers and Dissolutions:** This office processes appeals to the General Executive Board from trials held in subordinate bodies. It also processes Local Union and District Council charters and tracks mergers and dissolutions of subordinate bodies.

**Death Claims:** This office processes member deaths, disability and dismemberment claims and responds to inquiries regarding these programs.

**Enhanced Integrated Member Services "IMSe" System:** This office is responsible for deployment of the Membership, Dues, and Education Components of the IMSe system to our Affiliates, provides Remote and/or In-Person Training as needed for New & Existing System Users, and provides Technical Support via the IMSe Support Desk (*email: [imssupport@iupat.org](mailto:imssupport@iupat.org)*) for All System Users.

**Compliance/Personnel:** As a federal contractor, the IUPAT is responsible for administering the Job Corps contract and its provisions that require Equal Employment Opportunity (EEO), VETS and Affirmative Action Plan (AAP) reporting. The Compliance Department is responsible for these responsibilities. The Department also handles personnel matters for IUPAT and, in accordance with service agreements with the LMCI and FTI, the Department also handles personnel functions for these funds. Personnel functions include address and name changes, time and attendance, 401(k) administration, onboarding/retirements/terminations processing, health benefits administration and invoicing, personnel and benefits file maintenance, etc. Employees should send an email to [Compliance@iupat.org](mailto:Compliance@iupat.org) to request information or to set up a confidential meeting to address any personnel matters.

**Shipping & Supply:** This office handles receipt and delivery of all shipments, whether by mail or private courier, and maintains the office postage meters. The office also orders all purchases, maintains an inventory of all supplies, deals with auto repairs and maintenance and ships supplies to District Councils and Local Unions. Finally, the office assists with all physical moves within the offices.

**Union Privilege:** This program provides our members with benefits such as a mortgage and real estate program, a Choice loan program and a union family savers program. Additional information can be found on the IUPAT intranet under the UnionPlus – Member Discounts and Benefits icon.

## **FINISHING TRADES INSTITUTE**

The Finishing Trades Institute (FTI) is a 501(c) (3) organization governed by a Board of Trustees consisting of an equal number of trustees appointed by the International Union of Painters and Allied Trades (IUPAT) and the Finishing Contractors Association (FCA). The FTI provides ongoing education and training using a standardized curriculum. FTI's curriculum is approved for academic credit leading to Associate's and/or Bachelor's Degrees and various certifications. The training provided by the FTI provides IUPAT members with the skills they need to have rewarding careers in the finishing trades, and to provide signatory contractors with the world class workforce that gives them a competitive advantage.

## **LABOR MANAGEMENT COOPERATION INITIATIVE**

The LMCI is a jointly administered trust fund governed by a board of trustees appointed by the IUPAT and the Finishing Contractors Association. LMCI works to enhance cooperative labor-management relationships in the finishing industries. The LMCI is the primary resource for industry leader education, knowledge exchange, marketing and networking that improves the opportunities for finishing industry employers. The LMCI offers its services and programs to finishing industry associations, signatory employers and the IUPAT at both national and local levels.

## **IUPAT INDUSTRY PENSION PLAN**

**The International Painters and Allied Trades Industry Pension Plan** is a defined benefit pension plan established to provide retirement benefits for employees working in the United States under IUPAT collective bargaining agreements. The Plan is administered by a Board of Trustees consisting of an equal number of Union and Employer representatives.

**The International Painters and Allied Trades Industry Pension Plan (Canada)** provides retirement benefits for Canadian employees covered by IUPAT Collective Bargaining Agreements. It also is managed by jointly appointed trustees.

**The Annuity Plan** is a defined contribution, or individual account pension plan, established to provide supplemental retirement benefits to participants in the Industry Pension Plan. It also is managed by jointly appointed trustees.



# **PERSONNEL POLICIES**

## **EQUAL EMPLOYMENT OPPORTUNITY**

The Employers are committed to providing equal employment opportunities to qualified individuals regardless of sex, gender identity, sexual orientation, race, color, religious creed, national origin, physical or mental disability, protected veteran status, and any other status protected by law with regard to any employment practices. Toward that end, slurs, epithets, disparaging remarks or jokes that demean others are prohibited.

In support of this policy, all employees are expected to:

- Treat co-workers with respect;
- Refrain from making offensive or insulting remarks to or about others in the workplace; and
- Discuss any concerns about inappropriate treatment by co-workers, supervisor, agents or clients with their supervisor.

## **SEXUAL HARASSMENT**

Harassment on the basis of sex violates the law and will not be tolerated. Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature constitute sexual harassment when:

- Submission to such conduct is made a term or condition of an individual's employment;
- Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual;
- The conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive working environment regardless of whether that individual is the target of the harassment.

In short, unwelcomed behavior of a sexual nature is prohibited.

## **COMPLAINT PROCEDURE**

The Employers' complaint procedures are designed to: (a) encourage employees who believe they are victims of improper conduct to come forward, (b) assure confidentiality to the extent possible and (c) protect complainants and witnesses from retaliation. All complaints will be investigated promptly and appropriate remedial action will be taken. Retaliation will not be tolerated.

Any complaint should be made promptly in accordance with the following procedures:

- 1) Your initial complaint should be made to your manager/supervisor, unless your manager/supervisor is the subject of your complaint, in which case, your complaint should be made to the Executive Assistant to the General Secretary-Treasurer (EAGST). Your complaint will be investigated and you will be informed of the proposed resolution.
- 2) If you are not satisfied with the proposed resolution, you may appeal, within five business days. IUPAT employees should appeal to the General Secretary-Treasurer, LMCI and FTI employees should appeal to the Executive Director.

All complaints will be treated confidentially to the extent possible.

## **DAYS & HOURS OF WORK**

Forty (40) hours constitutes the regular workweek. The work days are Monday through Friday, and the hours are eight (8) hours per day, with thirty minutes (30) or one (1) hour for lunch per day. Subject to the Employers' right to assign specific start times if needed to cover the functions of the office, employees may set their own hours as long as they comply with the following flextime guidelines.

1. All employees must report to work between 7:00 a.m. and 9:00 a.m.
2. Employees must swipe in at the beginning and end of their workday. Example: An employee swipes in at 7:35 a.m. will swipe out no earlier than 4:05 p.m.

3. All employees will take lunch between 12:00 p.m. and 12:30 p.m., unless assigned to take lunch at a different time. The standard lunch break will be 30 minutes. With their manager's approval, employees may take one-hour break.
4. Employees must keep their manager and their backup advised of their planned reporting time.
5. Employees may take two ten-minute breaks – one morning and one afternoon.

Eligible employees are entitled to overtime pay for hours worked in excess of 40 hours per week. Overtime must be approved in advance by your manager/supervisor.

A \$10.00 meal allowance will be paid to any employee working more than two hours beyond his or her regularly scheduled quitting time. For example: an employee working 4:45 p.m. to 7:00 p.m. has worked over two hours and, therefore, will receive the \$10.00 meal allowance.

### **Tardiness**

An employee who has no leave and reports to work after 9:00 a.m. is considered tardy. Employees who do not have scheduled leave must call the Attendance Line at 410-564-5948 or send an email to [Compliance@iupat.org](mailto:Compliance@iupat.org) by 9:00 a.m. for a “same day” absence or to inform that they will be late. As a courtesy, employees should also contact their manager/supervisor.

Bargaining unit employees who do not have leave, will have their pay docked for tardiness in accordance with the Collective Bargaining Agreement.

### **Clocking In & Clocking Out**

Employees who are required to clock in and out should use the ADP website to record the time of your arrival and departure each day.

Employees who are required to clock in and clock out have a responsibility to ensure that their departure time coincides with your arrival time.

**Example:** An employee who clocks in at 8:11 a.m. will clock out no earlier than 4:41 p.m., unless leave has been requested and approved prior to departure.

Employees who use leave in the middle of a regular work day, must clock in and out accordingly to create an accurate time and attendance record. If an employee fails to do so, this will be counted as a mis-swipe.

**Example:** An employee who clocks in at 7:30 a.m., leaves for an appointment at 11:30 a.m. and returns at 1:15pm needs to clock out at 11:30 a.m. and clock in upon return from the appointment.

There is a way to check your clock in and clock out is to log into ADP and click on the Myself tab → Time & Attendance → My timecard. Any issues should be immediately directed to [Compliance@iupat.org](mailto:Compliance@iupat.org).

### **Mis-Swipes**

An early clock out or failure to swipe in or out is considered a “Mis-swipe.” An employee is forgiven for the first three (3) mis-swipes, per calendar year. Should an employee receive a mis-swipe, the employee will be notified via [Compliance@iupat.org](mailto:Compliance@iupat.org).

Subsequent mis-swipes result in the employee being docked a minimum of 15 minutes or for the amount of time actually absent.

Any issues encountered clocking in to start the day, should be directed to [Compliance@iupat.org](mailto:Compliance@iupat.org) immediately following the issue no later than 9:30 a.m.

If an employee is unable to clock out due to an error message received at the end of the day, should send an email to [Compliance@iupat.org](mailto:Compliance@iupat.org) as soon as possible and no later than 9:30 a.m. on the following day. Employees are required to include their manager/supervisor on the email.

## **COVID PROTOCOL**

All employees must be fully vaccinated and be able to submit proof of vaccination. Along with being fully vaccinated, employees must wear a mask in common areas around the office. However, at your desk you may remove your mask. Any and all visitors/guests will be required to provide proof of vaccination to gain access to the building(s).

In addition to the vaccination all doors will be locked on campus and only IUPAT employees and approved guests will have access to the buildings during work hours. Under no circumstances should a guest be allowed entrance into any of the IUPAT buildings without checking in at the main building and confirming proof of

vaccination. When scheduling meetings, please advise your guest(s) of the proof of vaccination requirement. You must also contact the front desk to advise that you are expecting a visitor.

If an employee orders food, be sure to provide your phone number so that the delivery driver can call you upon arrival to building. Employees will be responsible for meeting the driver to receive your order.

## **LEAVE**

Paid leave policies are summarized below. You are required to exhaust all paid leave before requesting leave without pay.

### **Personal Leave**

FLSA covered employees receive 12 days of personal leave per year. Employees who use five (5) or more days of leave without pay, unscheduled leave or a combination of both in one month, will forfeit their personal day for the following calendar month.

Personal leave may be used in 15-minute increments at a time mutually agreeable to both the employer and the employee. Except in the case of an emergency or illness, all use of leave must be pre-approved. The Employers request that employees make every effort to give reasonable notice when requesting use of leave. Leave may be denied if it is not an agreeable time to be off with the employer. All unused personal leave will be paid out at the end of the year, provided that employees may carry over up to 35 hours of personal leave. Employees are to submit a payout or rollover request via the Personal Leave Payout/Rollover Form, via the ADP portal and forward the completed form to [Compliance@iupat.org](mailto:Compliance@iupat.org) .

### **Vacation**

Those employed for one year are entitled to two weeks of vacation and those employed for five or more years are entitled to three weeks of vacation. Those employed before July 1, 2011 may be entitled to additional vacation leave. Vacation must be used in at least 2-hour increments. All vacation leave must be pre-approved. You may cash out unused vacation leave or roll over a maximum of 40 hours on your anniversary date. Employees are to submit a payout or rollover request via the Vacation Payout/Rollover Form, via the ADP portal and forward the completed form to [Compliance@iupat.org](mailto:Compliance@iupat.org) .

## **Other Policies Related to Leave**

An unsatisfactory attendance record, excessive unscheduled use of leave, frequent lateness, failing to provide notice of unplanned absences, leaving the office without notifying your supervisor may be cause for discipline.

## **FAMILY AND MEDICAL LEAVE ACT**

Qualified employees are eligible for leave under the federal Family and Medical Leave Act ("FMLA").

FMLA leave can be taken for: (1) the birth of an employee's child in order to care for such child; (2) the placement of a child with an employee for adoption or foster care; (3) the care of a spouse, son, daughter, or parent of the employee because of a serious health condition; or (4) an employee's serious health condition that makes the employee unable to perform the functions of his or her position.

Where such leave is foreseeable, employees must provide at least 30 days' advance notice before taking family or medical leave. Where the need for such leave is unforeseeable, employees must make requests to their manager/supervisor as soon as possible.

You are required to exhaust all paid leave before requesting leave without pay for FMLA purposes.

The FMLA process for the Employers is managed by TASC. Should you need more information, please contact [Compliance@iupat.org](mailto:Compliance@iupat.org) or TASC at 866.784.9266.

## **MARYLAND PREGNANCY ACCOMMODATION**

The employers will be fully in compliance with this act that became law October 1, 2013, provided that employees meet the notification requirements of the CBA regarding maternity leave.

## **INCLEMENT WEATHER**

In case of inclement weather, you should call the office at 410-564-5900 for any pre-recorded messages (if any). Any updated recorded messages should be available between 5:00 a.m. and 6:00 a.m. If you hear the normal message, report to work

business as usual. If the office is to be closed, you will hear a message stating "The office will be closed today due to inclement weather."

In the event that the main line is inoperable, information concerning office closures and other important office information will be sent by text to all who have voluntarily submitted their cell phone numbers to receive updates. You may text the word "Emergency" to 33222 (IUPAT) to be added to the alert list.

If the office is closed because of inclement weather, employees will be required to work remotely.

## **ALCOHOL & SUBSTANCE ABUSE POLICY**

Use of illegal drugs or abuse of alcohol in the course of employment is prohibited.

However, the Employers recognize that substance abuse is a medical issue that may be successfully treated. Therefore, assistance will be provided to any employee who seeks it. Normally, the Employers will not approve a treatment program that requires an employee to be absent from work for more than thirty (30) days, nor will the Employers provide assistance more than once during an employee's tenure. In no event will the Employers pay for treatment that is not covered by the existing benefit plans.

If an employee is admitted to a residential treatment program, he or she will be required to use personal leave or vacation for the first fourteen (14) days of the program. If the employee has insufficient leave, FMLA leave or short-term disability benefits may be used. If an employee enrolls in a treatment program and subsequently fails to successfully complete the program, or fails to comply with the rules and regulations of the treatment program, or if an employee returns to work and subsequently violates the Alcohol and Substance Abuse Policy, the employee may, in the discretion of the employer, be disciplined up to and including discharge.

## **DRESS CODE**

The Employer's dress code is business-casual, the only firm rule being that all employees must still present a professional image. Please consult your manager/supervisor if you have questions as to whether certain attire is appropriate.

## **SMOKING POLICY**

The Employers adhere to the Maryland Clean Indoor Air Act of 2007, which prohibits smoking in indoor places of employment. Smoking is allowed only in designated smoking areas. You may not take additional breaks, beyond normally approved breaks, to smoke.

## **EVACUATION PLAN**

A complete evacuation plan and other information concerning emergencies is provided in the Employers' Manual on Emergency Preparedness. You should obtain a copy of this manual and be familiar with all emergency procedures.

## **PAYROLL PRACTICES**

You will receive your pay statement bi-monthly on the 15<sup>th</sup> and last business day of each month via ADP. A statement detailing pay, taxes and deductions is available to employees on the ADP website.

Federal, state, and local income taxes, social security payments and, where applicable, union dues are deducted from your pay. Union dues, where applicable, are deducted bi-monthly. You may authorize voluntary deductions for contributions to the PATCH Foundation or to the IUPAT's Political Action Fund, Political Action Together.

Employees may reset an ADP password in the event they want to change it or if they forget it. If an employee is locked out of the site, please send an email to [Compliance@iupat.org](mailto:Compliance@iupat.org), requesting the reset. Once the reset has been completed, the employee will receive an email to inform them of the reset.

## **KEEPING OUR RECORDS CURRENT**

Please notify us via [Compliance@iupat.org](mailto:Compliance@iupat.org), if there are changes in any of the following information:

1. Your marital status, name or home address
2. Your home telephone number or cell phone number
3. The number of your dependents (birth and/ or adoption of a child)
4. The beneficiary for your Life Insurance



5. Correction to your social security number
6. Emergency contact information

\*Please contact the Compliance Department with specific questions as to documentation requirements pertaining to changes to dependent benefits.

## **TERMINATION & DISCIPLINE**

When an employee does not perform satisfactorily or does not abide by our rules of conduct, appropriate disciplinary action will be taken. Such action may include a verbal warning, a written warning, suspension without pay, and/or termination, depending on the severity of the violation. It is the policy of the employer that all discipline decisions will be made fairly and uniformly. Any employee may be terminated by the employer at any time with or without cause, except as provided in the Collective Bargaining Agreement.

## **PERFORMANCE EVALUATIONS**

Annual Performance Evaluations offer employees and managers the opportunity to measure performance accomplishments and set new goals. Performance Evaluations are intended to highlight both strengths and shortcomings, including suggestions for ways to improve performance and behavior as needed. Other factors that influence your evaluation are the quality of your work, the timeliness of your work, your behavior and your attendance/punctuality record.

Performance reviews will be performed as expeditiously as possible in conjunction with the following schedule set by the Employer: All evaluations for Bargaining and Non-Bargaining employees are to be completed each year by August 15<sup>th</sup>. Evaluations for FLSA Exempt employees will be performed by December 15<sup>th</sup> of each year. Employees should receive a copy of their completed evaluation for their own personal files. It is recognized that flexibility in the timing and issuing of reviews is necessary in light of supervisory travel schedules and the press of other business. Merit and promotional consideration will be at the manager/supervisor's discretion.

## **PERSONNEL FILES**

The Employers maintain personnel files for each employee. These records are kept private and confidential. An employee may request to review their respective personnel file by contacting the Compliance Department directly or send a request to [Compliance@iupat.org](mailto:Compliance@iupat.org).

## **EMPLOYMENT REFERENCES & RECOMMENDATIONS**

In response to an information request from a third party (outside organization, individual, or government entity), The Employers will verify only the employment status, position title(s), and date of employment for former or current employees. All requests for employment references, recommendations or verification should be forwarded to [Compliance@iupat.org](mailto:Compliance@iupat.org). No employee is authorized to provide a reference for any other employee.

## **BENEFITS**

The Employers currently provide a benefits program for all regular full-time employees. Summary Plan Descriptions, plan documents and other information fully describing these plans are available from the EAGST and you are encouraged to obtain and review these documents. A brief description of current benefits follows.

**Health, Dental, Vision and Prescription Insurance** - Coverage is provided to the employee, and becomes effective after the thirtieth (30) day and following first (1<sup>st</sup>) day of the month from the initial date of employment. Information pertaining to the IUPAT and affiliated funds health, dental, vision, and prescription plans may be obtained by reviewing the insurance provider's Summary Plan Description. The Compliance Department is also a good source of information on specific details concerning health benefits coverage.

**Health Reimbursement Account (HRA)** – The employer contributes on behalf of each employee to the HRA. Employees become vested after five (5) years. This plan is a post-separation plan. The claims eligibility date for a participant is the date of retirement or separation from employment after vesting.

**Pension** –The employer makes pension contributions on behalf of each employee. Pension coverage becomes effective from the initial date of your employment. Information pertaining to the IUPAT Industry Pension Plan can be obtained from the Summary Plan Description Booklet issued by the Industry Pension Fund. This booklet may be obtained from the Pension Fund office.

**401(k) Plan** –The Employer contributes a total of 6% of the employee's gross wages to the 401k plan. Employees become eligible after 30 days of service. When eligible, you may enroll in the plan on the first day of the next month. Information pertaining to the IUPAT 401(k) Plan (beneficiary designation, contribution changes, hardship requests, etc.) can be obtained from the Compliance Department.

**Life Insurance, AD&D, Short- & Long-Term Disability Insurance** – Life insurance and accidental death and dismemberment insurance coverage is provided at no cost to the employee, and becomes effective after the thirtieth (30) day and following first (1<sup>st</sup>) day of the month from the initial date of employment.

**Workers' Compensation Insurance** – All employees are covered by the workers' compensation insurance for injuries sustained while working. Please report any on the job injury or illness to your immediate manager/supervisor and the Compliance Department.

**On – Site Fitness Center** – The Fitness Center membership is available to all employees at no cost. All participants are required to sign a “hold harmless” agreement before using the Fitness Center.

## **EDUCATION ASSISTANCE**

The Employers will provide such training as they deem necessary for employees to properly perform their jobs.

Full time employees with at least one (1) year of employment are eligible to participate and the approved educational courses must be offered by an accredited institution.

1. Employees must submit a written request to their manager/supervisor for education assistance, detailing the type of course(s) being taken and how they feel it will further their job qualifications and are directly related to their current position. Upon manager/supervisor approval, the request should then be sent to the Office of the General Secretary-Treasurer's Office for final approval. The employee will then be notified of the decision.
2. Employees must receive a passing grade of C or above when graded by letter and Pass when graded by Pass/Fail, in the class.
3. Employees must be able to submit the proper documentation substantiating the grade(s) received, and provide an invoice detailing the charges and payments, including scholarships paid.

## **IUPAT PROPERTY & USAGE**

Office telephones are intended for business use only. However, the Employers recognize that employees may need to make or receive a personal telephone call. Please limit your personal phone calls to very important matters and please keep your calls brief and to a minimum. Abuse of this policy may result in disciplinary action, up to and including termination of employment.

Employees may not make and/or receive non-critical personal calls on a cellular phone during working hours.

The mailroom processes an enormous amount of mail and packages daily. The Employers insist that you do not mail anything personal through the mailroom. Additionally, employees should not use employer postage for personal mail.

## **WORK STATIONS**

You should keep your work station neat and organized. Music is permitted, but it should be kept at a volume so as to not distract your co-workers. Ear plugs are not permitted.

For safety reasons, candles and space heaters are prohibited.

All private and confidential files and papers should be put away properly in a secure location.

Please remember to shut down your computer and printer when leaving at the end of the day and turn off any desk lights.

## **SUPPLIES & OFFICE EQUIPMENT**

Office supplies and equipment are for business use. Personal use of office supplies and equipment, without prior approval, is prohibited.

Office supplies may be obtained through the Supply Department. All orders for supplies should be emailed to the Supply Manager ([fmateo@iupat.org](mailto:fmateo@iupat.org)) with your manager/supervisor's approval attached. Orders for supplies will not be processed without your manager/supervisor's approval.