

"An Injury To One Is An Injury To All"

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Office of the General Chairman
Jed Dodd

UPS Overnight Mail

August 12, 2010

National Railroad Passenger Corporation
Joe Boardman, President
60 Massachusetts Avenue
Washington, DC 20002

Dear Mr. Boardman:

Re: Survivorship Issues

The purpose of this letter is to bring to your attention a problem that surviving spouses of deceased Amtrak employees encounter with Amtrak in the period immediately following the employee's death. We have evidence indicating that this problem is endemic to the institution.

A recent example of this problem can be found with Melissa Alleman, surviving wife of former General Superintendent Steve Alleman. In the several months following her husband's death she has documented more than 15 phone calls to Amtrak managers, many of which were unreturned, seeking to receive her late husband's last check owed and to obtain her life insurance benefit and other benefits to which she is entitled. It took over two months for her to receive the last payment she was owed. During that process Amtrak improperly cancelled her rail pass and threatened to cancel her medical benefits. When they finally issued her the life insurance checkbook, Aetna bounced a check and she had to make a very frustrating call to a center in India to attempt to resolve this problem. At every step of the way Amtrak officials, at the highest levels of the company, informed her that she was responsible for these problems because of faulty paperwork on her end. However, it was Amtrak that lost and later found the beneficiary forms that Amtrak initially claimed were not properly filed.

Our understanding is that the specific issues involving Mrs. Alleman have been largely resolved. The problem is that Amtrak should not be treating the survivors of

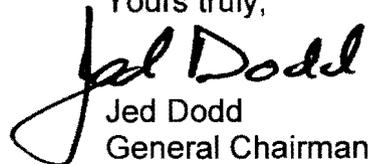
active Amtrak employees in this manner. I have no doubt that you agree with this sentiment. I also do not believe that any Amtrak employee who was involved in this debacle acted with malice. However, the institution failed Mrs. Alleman at the moment of her greatest need.

Amtrak needs to do better than this. Mrs. Alleman, or any other spouse, should not have been required to make any phone calls. An Amtrak official should have called her to express condolences on the death of her husband. This person would make it his/her responsibility to ensure that the last paycheck/vacation money was promptly paid, shepherd the life insurance payment through the process, ensure that the rail pass is protected and that all medical and other benefits are protected.

We would like to propose that you appoint a task force of all of the stakeholders in this situation that is tasked with the job of coming up with a procedure and a process that is proactive, friendly and helpful to the surviving spouse. The task force should identify each issue that needs addressing at the time of an active employee's death and the process to resolve these issues with the least burden possible on the surviving spouse. The task force should issue their report and recommendations within six weeks of it's appointment. Once you have approved of the recommendations, in whole or part, then the task force should oversee the implementation of the recommendations.

Personally I believe that Amtrak should specify Amtrak managers whose sole job is to shepherd the spouse through the process and that this manager is given special training for this task. I also understand that one of the problems, not in Mrs. Alleman's case, is the lack of up to date beneficiary forms from Amtrak employees. One of the jobs of the task force could be to suggest ways to correct this problem institutionally.

Should you desire to discuss this in more detail please do not hesitate to contact me. My suggestion of a special task force is only my suggestion. Perhaps you have a better idea on how to fix this problem. I would be interested in having that discussion with you and I hope to hear from you soon.

Yours truly,

Jed Dodd
General Chairman

cc Melissa Alleman

Memo



Date December 3, 2010
To See Distribution

From Robert Lynch
Department Compensation & Benefits
Subject **Benefit Process for Survivors of Deceased Employees and Deceased Retirees**
cc Mike Duncan

Message Amtrak provides employees with a comprehensive benefits package to assist employees with various needs in their lives. This package includes assistance for family members when an employee dies. The death of a loved one is a very difficult experience and it is at this difficult time that Amtrak representatives must assist dependents by providing information about such items as life insurance, continuing medical coverage, obtaining the final paycheck, and continuing rail pass privileges. These benefit items stretch across various Amtrak departments and until now have required various Amtrak representatives to communicate with family members.

Effective immediately, the Amtrak Benefits Team, which consists of Terry Dorsey and Bob Lynch, will be solely responsible for assisting family members of deceased employees and deceased retirees with all benefits related matters. The Benefits Team will be responsible for communicating with family members, determining benefit entitlements, and producing and sending condolence packages. They will be a single point of contact in managing all aspects of the process from start to finish.

The condolence package will be personalized and vary based on benefits eligibility. It will be mailed as soon as possible and no later than 10 business days from the notification of death. The package will include the following information, if applicable:

- Forms to obtain the final paycheck and outstanding vacation pay;
- Explanation of how long benefits will continue and how to obtain COBRA coverage;
- Details about the life insurance amount – This will be provided if the package is addressed to the beneficiary. If no beneficiary is on file, the steps for obtaining the life insurance payment will be included;
- 401(k) distribution package from Fidelity Investments;
- Determination of Retirement Income Plan pension eligibility and if eligible, notification that a detailed calculation will be provided within 2 weeks;
- Application to continue rail pass privileges will be included;
- Request for family to provide Certificates of Death (include pre-addressed envelope);
- Contact information for the Railroad Retirement Board;
- Contact information for Terry Dorsey and Bob Lynch.

The Benefits Team will be responsible for ensuring that the final paycheck is paid, health coverage continues uninterrupted, life insurance is processed and paid, pension information is provided, and the rail pass application is returned and processed. Most importantly, the Benefits Team will be the single point of contact for assisting the family members.

By providing this information and assisting the family members, Amtrak will be expressing sincere sympathy and providing support to the family of an Amtrak employee during a difficult period in their lives.

Information about the deaths must still be provided by the managers and entered into SAP in the HRESC. Many deaths are also reported by family members to the Amtrak Benefits Service Center. The Amtrak Benefits Team will review information about deaths on a daily basis to ensure information is provided to family members on a timely basis.

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