

# Employee Exit Guide 2023-2024

PEARLAND INDEPENDENT SCHOOL DISTRICT

HUMAN RESOURCE SERVICES



Dear Valued Employee,

Thank you for the time and dedication you put into your employment with the Pearland Independent School District. I hope you were fulfilled knowing you contributed daily to the success of the students who attend our schools.

Whether you have decided to resign your position or retire from education, I wanted to take this opportunity to say thank you. Your part, big or small, made a difference in some child's life. I wish you well in your future endeavors.

Sincerely,

*Sundie Dahlkamp, Ed. D.*

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Executive Director of Human Resource Services & Communications

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## **INTRODUCTION**

This Exiting Employee Information Guide has been assembled to assist you as you conclude your employment in the Pearland Independent School District. It provides you with information regarding termination procedures, final pay, benefits, and other important information. The package includes a Quick Reference Guide (last page) so that you know who to speak with if you have questions.

We would like to remind you of your obligations as a former employee of Pearland ISD under the Educators' Code of Ethics located in Policy DH (exhibit). As you know, your employment with the Pearland ISD places you in a position of trust within our organization and allows you to have access to confidential student information.

Under the Code of Ethics, you have an obligation, even after the termination of your employment, to maintain the confidentiality of the student information. You also have an obligation to refrain from using or disclosing any such information other than for the benefit of the students.

We have made every attempt to ensure the accuracy of the information contained in the Exiting Employee Information Guide. However, if there is any discrepancy between the benefit descriptions and the insurance contracts or other legal documents, the legal documents will always govern.

Pearland Independent School District appreciates your contribution to students and wishes you future success in all your endeavors!

## **EMPLOYEE RESPONSIBILITIES**

### ▪ **Submit your Letter of Resignation – Contract Employees**

Teachers, administrators, and other full-time professional personnel who are required to hold a valid certificate or teaching permit seeking to resign their position during the school year may submit a letter of resignation or complete a Release from Contract Form and submit it to their supervisor. The employee is not released from contract until the superintendent accepts the resignation. Those looking to resign at the end of their work calendar may submit a letter of resignation including your last day of work and a signature or complete a Release from Contract Form. You should indicate if you are retiring through TRS. Completion of an Exit Interview is required during the last two weeks of employment.

### ▪ **Submit your Letter of Resignation - Non-Contract (At-Will) Employees**

A non-contract at-will employee who desires to voluntarily resign from the district should submit a notice to his or her supervisor, generally two weeks in advance of the intended resignation date. If your resignation is due to retirement, indicate whether you are retiring through TRS. The following should be included in your Letter of Resignation:

- Your signature
- Your last day of work

\*Completion of an Exit Interview is required during the last two weeks of employment.

### ▪ **Return District Property**

The following items must be returned to your supervisor before your departure from the school district.

- Identification badge
- District issued cell phone or other communication devices
- All keys
- Computers, electronic equipment and peripherals accessories
- Equipment provided for home or travel use
- Files, folders, manuals and/or records
- Any other school property
- Repay any outstanding district debt

*\*\*Network access will end following your last day of employment. Any documents needed after access has ceased should be requested through the Technology Department.*

### ▪ **Elect Cobra Continuation Coverage if you need to extend your medical, dental, and/or vision coverage**

You have sixty (60) days after your benefits expire to elect Cobra Continuation Coverage. You will receive two notices in the mail from the District's Cobra Administrators.

- TRS ActiveCare - BSwift (Medical Only): 1-833-682-8972
- Navigate HCR (Dental and/or Vision): 1-855-742-7427, Option 2

### ▪ **Update your Demographic Data on File**

Please update your demographic data through Employee Self Service (ESS). ESS can be accessed from the Staff Tab on the District website at: [Employee Self Service](#)

The ESS will provide you with the following important information during and after your employment:

- Paychecks – View and print current or historical checks
- W-2, Wage and Tax Statements – View and print current or historical statements
- Demographic Data – Update your address, phone number or contact information online

## **REQUEST FOR RECORDS**

To request copies of your service records, go to the district’s website under the Employment Tab, click Employee Request Forms > and select [Request for Records](#)

**Note:** The experience column on the service record is based on the beginning of each school year.

Employees resigning from Pearland ISD at the end of the current contract year should expect documents to be mailed to another district no earlier than the end of July, providing the employee has resigned by the last day of the current school year. Original Records can only be released after the resignation has been accepted.

If records are released to you, you are responsible for original documents. These are the only originals and are required upon employment with another district.

## **WHAT HAPPENS WITH MY FINAL PAY?**

### **Employees who terminate prior to the end of their work calendar:**

Final pay is scheduled for payment according to the Pearland ISD payroll calendar [2023-2024 Payroll Calendar](#) and should be expected on the payroll date that the term date falls within. Please note that there can be exceptions to this schedule, but the district makes every effort to pay final payments as promptly as possible. Twelve-month employees who terminate after December 30 could be in an overpayment status and are subject to a minimal payoff due to observance of district designated holiday breaks. In addition, 12-month employees’ payoff may not be paid according to the district payroll calendar.

Final pay is prorated based on the number of workdays completed. The cost of unearned leave days is deducted from the employee's final paycheck.

Final pay will continue to be direct deposited to the designated account on file. If direct deposit information is not available, a check will be mailed to the address on file.

**Employees who terminate upon completion of their work calendar:**

Employees who complete their work calendar and work all designated workdays will receive their final pay according to the chart below.

<b>Scheduled Number of Work- Days</b>	<b>Final Paycheck Date</b>
261 hourly employees	According to payroll calendar
229-261 days	June 30
198-215 days	July 30
190-197 days	August 15
Less than 190 days*	August 30

*\*Bus drivers hired after March 1 who resign at the end of the school year receive their final check on June 30.*

**Access to Payroll Check Stubs and W-2 Information**

You may access the Employee Self Service online indefinitely after leaving Pearland ISD. The ESS can be accessed from the Staff Tab on the district's website.

\*\*You will be able to view payroll check stubs as well as W-2 information indefinitely. You may also use the ESS to change your mailing address. Please note that W-2's are no longer mailed and can be accessed on the ESS on or before January 31st each year.

**WHAT HAPPENS TO MY LEAVE BALANCES?**

State Leave balances will be listed on the employee's Service Record and are available for use with any other district in the State of Texas.

Local Leave balances will be available to employees who return to work with Pearland ISD, according to the district's board policy, DEC (LOCAL):

*Upon termination of employment, any unused local leave shall be reduced to zero. For an employee who was previously employed by the district for at least two consecutive years, however, the district shall restore the balance of local leave if the employee returns to District employment within three calendar years following termination. The district shall not reinstate local leave for which an employee has been reimbursed upon retirement.*

## **Payment of Leave at Retirement**

Full-time employees who retire under the Teacher Retirement System (TRS) guidelines shall be paid for unused local leave in accordance with Board Policy. An example spreadsheet of the Local Leave Retirement Payoff Estimate is available on the district's intranet, under Business Services Internal Documents.

## **WHAT HAPPENS TO MY MEDICAL AND/OR DENTAL/VISION BENEFITS?**

### **Employees Who Terminate Prior to the End of Work Calendar**

If you terminate employment with the district before completing the number of workdays assigned to your school year work calendar, your insurance and benefits will end at midnight on the last day of the calendar month in which your termination is effective.

Employees enrolled in medical, dental, or vision insurance plans who receive their final paycheck on the 15th of the month in which they terminate will have the full month premium deducted from that check. If there are not sufficient funds available to deduct the full month premium(s), you will be billed for the balance(s) of premiums due.

### **Employees Who Terminate On or After Last Day of the School Year**

For those employees that have terminated employment on or after the last day of the school year, the district will terminate your benefits according to the schedule below.

<b>Scheduled Number of Days in School Year Work Calendar</b>	<b>Benefits End at Midnight on</b>
229+ Days	June 30
198-228 Days	July 31
178-197 Days	August 31

Employees should contact their medical, dental and/or vision insurance carriers directly if they elect to continue coverage through COBRA.

### **COBRA Continuation Coverage**

You may choose to keep your benefits coverage longer by enrolling in COBRA (Consolidated Omnibus Budget Reconciliation Act of 1985). Under COBRA, you and all dependents that were covered on your plan may continue medical and/or dental/vision coverage for up to 18 months if elected. An election packet will be sent to you at your address of record within approximately 6 weeks from your termination date. The cost is 102% of the total premium, which includes the employee and employer portion, and an additional 2% service fee.

If you are interested in continuing coverage, you should return the completed election form and payment of premiums within 60 days from your last date of coverage as an active employee. Once



payment is received, insurance coverage will be retroactively effective, the day after your benefits expired.

You will receive a *Certificate of Creditable Coverage* from BCBS, which documents your prior coverage under the Pearland ISD medical plan and may exempt you from a future-plan's restrictions on pre-existing conditions.

**Note:** If you were not a participant in medical, dental and/or vision insurance as an active employee, you will not receive the COBRA offering or extending medical, dental and/or vision insurance. If you and your dependents were on the plan, and you yourself choose not to continue insurance coverage, your dependents may still elect to continue coverage, if desired.

### **Cobra Administrator for Medical:**

Bswift (TRS ActiveCare)

1-833-682-8972

7:00 a.m. - 4 p.m. (Central Time), Monday through Friday

Mailing Address:

P.O. Box 2780

Omaha, NE 68103-2780

### **Cobra Administrator for Dental and Vision:**

Navigate HCR

1-855-742-7427, Option 2

7:00 a.m. - 7 p.m. (Central Time), Monday through Friday

Mailing Address:

16885 W. Bernardo Drive #290

San Diego, CA 92127

## **WHAT HAPPENS TO MY FLEXIBLE SPENDING ACCOUNTS AND/OR HEALTH SPENDING ACCOUNTS?**

### **Health Care Flexible Spending Accounts (FSA) and Dependent Care Spending Accounts (DCSA)**

If you have unused balances in your Health Care FSA account and/or your DCSA, you can be reimbursed for eligible expenses incurred prior to your termination date.

FSA expenses incurred after your termination date will not be eligible for reimbursement unless you elect to continue your FSA through COBRA. Your FSA can be continued through the end of the calendar year in which you terminate IF you elect to continue the account through COBRA. You cannot continue

your FSA after the end of the calendar year in which you terminate.

Participation in your DCSA ends on your termination date and any unused funds are forfeited unless you have eligible expenses prior to your termination date, as stated above.

**IMPORTANT:** You have ninety (90) days after your termination date to submit claims to Optum Financial.

### **Health Savings Accounts (HSA)**

If you have unused balanced in your Gulf Coast Educators FCU HSA, you can still utilize the available funds in your account for qualified medical expenses. If you would like to reimburse yourself for medical expenses you have already made, you may do so for expenses that were incurred after the date that your HSA was originally opened. Removing the funds from your HSA for non-qualified medical expenses may incur an IRS penalty tax.

Your HSA and membership at Gulf Coast Educators FCU will not be closed unless explicitly requested by you. If you are no longer covered by a HDHP, are enrolled in Medicare, or are eligible to be claimed as a dependent on another individual's tax return, you may no longer be eligible to contribute to your HSA.

For more details, please check [IRS Publication 969](#) and [IRS Publication 502](#).

How to check your HSA balance:

- Login to your online banking portal
- Login through the GCEFCU mobile app
- Call 281-487-9333

### **Gulf Coast Educators FCU HSA**

Phone: 281-487-9333

Email: [hsa@gcefcu.org](mailto:hsa@gcefcu.org)

[www.texaseducatorshsa.com](http://www.texaseducatorshsa.com)

## **WHAT HAPPENS TO MY LIFE INSURANCE?**

### **Life Insurance Conversion**

Your Basic, Voluntary, Spouse, Child and AD&D life insurance coverage remains in effect through the last day of the calendar month in which your termination was effective. You may apply for conversion of your Basic, Voluntary, Spouse and Child life insurance to an individual insurance policy within 31 days of your employment termination date. Evidence of insurability will not be required. There is no conversion available for AD&D insurance. You may convert all or any portion of your life insurance which was in force on the date your life insurance ceased. If you fail to apply within 31 days of your employment termination date, the option to convert is no longer available.

## **Life Insurance Portability**

Instead of life insurance conversion, you can also continue your Voluntary Employee and Voluntary Spouse life insurance coverage (“portability”) under the Pearland ISD group policy, subject to the amounts of coverage you had in force while actively employed. Portability of Basic life insurance is not available. Competitive rates apply but will likely be higher than your current rates. If you fail to apply within 31 days of your termination date, the portability option is no longer available.

## **Applications for Conversion or Portability of Insurance**

If interested in converting or porting life insurance coverage, go to [Voluntary Life](#) to explore these options. Contact Lincoln Financial Group directly at 1-800-423-2765 within 31 days of your termination date. If you fail to apply within 31 days of your termination date, the portability and conversion options are no longer available.

## **WHAT HAPPENS TO MY CANCER INSURANCE?**

Your cancer insurance through Colonial Life will terminate on the last day of the month that your date of termination occurs.

You may continue your cancer insurance coverage through portability. Colonial Life provides portability coverage under which the benefits, terms and conditions will be the same as those provided under the policy when your insurance terminated. Colonial Life must receive a written request and payment of the first premiums for the portability coverage no later than 30 days after such termination. Portability coverage may include any eligible dependents who were covered under the policy. Coverage will be effective on the day after insurance under the policy terminates.

### **Colonial Life Contact Information:**

P.O. Box 1365  
Columbia, South Carolina 29202  
Phone: (800) 325-4368  
Fax: (800) 561-3082

## **WHAT HAPPENS TO MY ACCIDENT AND CRITICAL ILLNESS INSURANCE?**

Your accident and/or critical illness insurance through Lincoln Financial Group will terminate on the last day of the month your date of termination occurs.

You may continue your Lincoln Financial Group accident and/or critical illness insurance coverage through portability. Lincoln Financial Group provides portability coverage under which the benefits terms and condition will be the same as those provided under the policy which your insurance terminated. Lincoln Financial Group must receive a written request and payment of the first premium for the portability coverage no later than 30 days after such termination. Portability coverage may include any eligible dependents who were covered under the policy. Coverage will be effective on the day after insurance under the policy terminates.

For more information about continuing your Lincoln Financial Group accident and/or critical illness plan

please contact:

### **Lincoln National Life Insurance Company**

1H-20 PO Box 7894

Fort Wayne, IN 46801-7800

Phone: (800) 423-2765

<https://www.lfg.com/public/individual>

### **TEACHER RETIREMENT SYSTEM OF TEXAS**

Please contact the Teacher Retirement System for information regarding your TRS account at 1-800-223-8778 or [https://www.trs.texas.gov/Pages/about\\_contacts\\_us.aspx](https://www.trs.texas.gov/Pages/about_contacts_us.aspx)

#### **If you are planning to retire:**

If you are planning to retire, you need to contact the Teacher Retirement System of Texas (TRS) six months prior to your anticipated retirement date to allow yourself enough time to complete and submit all required forms. Start the retirement process by submitting a completed Request for Estimate of Retirement Benefits form (TRS 18) to receive a retirement packet. You may do this electronically, from the MyTRS section of the TRS website, or you may print Form TRS 18 from the forms section of the website, complete it and mail it to TRS.

After TRS receives your TRS 18, you will receive a retirement packet with the forms you need to select your retirement date and your retirement payment plan. When you receive your retirement packet, follow the instructions in the packet. You will need to send TRS a copy of your birth certificate, as well as a copy of the birth certificate of your beneficiary if you select Option 1, 2, or 5 as your annuity payment plan. Please write your social security number on any birth certificate you submit.

If you plan on retiring and have questions regarding retirement, please contact:

Melanie McWilliams- Payroll Manager, (832) 736-6125, [mcwilliamsm@pearlandisd.org](mailto:mcwilliamsm@pearlandisd.org)

- Planning for Retirement:  
[https://www.trs.texas.gov/TRS%20Documents/steps\\_planning\\_for\\_retirement.pdf](https://www.trs.texas.gov/TRS%20Documents/steps_planning_for_retirement.pdf)
- Retirement Eligibility Requirements:  
[https://www.trs.texas.gov/Pages/active\\_member\\_eligibility\\_requirements.aspx](https://www.trs.texas.gov/Pages/active_member_eligibility_requirements.aspx)

#### **If you are leaving employment but are not retiring:**

If you are leaving employment but are not retiring, you have three options:

- Leave your contributions in your plan.
- Transfer the funds from your plan to another eligible retirement plan (such as a 401(k) plan or an Individual Retirement Account (IRA)).
- Withdraw the accumulated contributions in your member account. Refunded amounts are subject to 20 percent federal income tax withholding. Also, a 10 percent early withdrawal penalty assessed by the IRS may also apply for members who terminate Texas public education

employment before age 55.

Leaving Employment but not Retiring:

[https://www.trs.texas.gov/TRS%20Documents/request\\_refund.pdf](https://www.trs.texas.gov/TRS%20Documents/request_refund.pdf)

### **Working after Retirement**

Service retirees may work without limit for an employer not covered by TRS without losing any monthly annuity payments. Disability retirees may work an unlimited amount of time for an employer not covered by TRS but may be subject to a compensation limit.

All retirees, both normal-age and early-age, must wait one full, complete calendar month after retirement before returning to work. Please note that you must observe TRS restrictions on negotiating for future employment, or you could revoke your retirement.

Employment After Retirement:

[https://www.trs.texas.gov/TRS%20Documents/employment\\_after\\_retirement.pdf](https://www.trs.texas.gov/TRS%20Documents/employment_after_retirement.pdf)

## **WHAT HAPPENS TO MY DEFERRED COMPENSATION ACCOUNTS?**

### **403(b) Account**

The money you contributed to your 403(b) is always yours, regardless of how long you have worked for Pearland ISD. There are several things that you can do with your 403(b) after leaving your job.

1. Leave your funds in the Pearland ISD 403(b) plan.
2. Rollover your 403(b) into a Traditional IRA. Contributions to Traditional IRA's receive the same type of tax deferral treatment as contributions to 403(b), so you may be able to rollover your money into a Traditional IRA and not owe additional taxes.
3. If your new employer has a 403(b) plan, you can have your 403(b) rolled over into their plan if their plan accepts rollovers.
4. Take a cash distribution. Be prepared for taxes to be withheld from it before you receive the money, and for possible penalties if you are under age 59 ½

If you choose options #2, #3 or #4 above you will need to contact the 403(b) administrator, The OMNI Financial Group, at 1-877-544-6664, <https://www.omni403b.com/Transaction/Landing/1122?sel=True>.

### **457 Plan**

The money you contributed to your 457 account is always yours, regardless of how long you have worked for Pearland ISD. There are several things that you can do with your 457 account after leaving your job.

1. Keep your money invested in the Plan and if desired, continue to manage your money within the offered investment options.
2. Rollover your 457 into an IRA.

3. If your new employer has a retirement plan, you can have your 457 rolled over into their plan if they accept rollovers.
4. Withdraw your money - subject to ordinary income tax.

If you choose options #2, #3 or #4 above you will need to contact the 457 administrator, The OMNI Financial Group, at 1-877-544-6664, <https://www.omni403b.com/Transaction/Landing/1122?sel=True>.

### **Medicare**

You may be eligible for Medicare benefits depending on your age and your reason for leaving employment. For more information, call 1-800-MEDICARE or visit [www.medicare.gov](http://www.medicare.gov).

## Contact Information

<b>TOPIC</b>	<b>CONTACT</b>	<b>PHONE NUMBER</b>
Accident and Critical Illness	Lincoln Financial Group	1-800-423-2765
Cancer Insurance	Colonial Life	1-800-325-4368
Cobra Continuation Coverage (Medical)	Bswift-BCBS	1-866-355-5999
Cobra Continuation Coverage (Dental/Vision)	Navigate HCR	1-855-742-7427 Option 2
Employee Assistance Plan (EAP)	Standard Insurance Company	1-877-851-1631
Exit Interview Questionnaire	Pearland ISD Human Resources	281-485-3203
Flexible Spending Accounts (FSA)	Connect Your Care/Optum Financial	1-877-292-4040
Health Savings Accounts (HAS)	Gulf Coast Educators Federal Credit Union	281-487-9333
Leave Balances/Final Paycheck/Retirement – General Questions	Pearland ISD Payroll Department	281-485-3203
Life Insurance	Lincoln Financial Group	1-800-423-2765 (portability/conversion)
Retirement	Teacher Retirement System of Texas	1-800-223-8778
403(b) and 457 Savings Plan	OMNI Financial Group	1-877-544-6664



## PEARLAND INDEPENDENT SCHOOL DISTRICT SEPARATION CHECKLIST

Resignation/Retirement letter turned in to your Principal/Director/Human Resources

If retiring, review Planning for Retirement document on TRS website.

Complete a records request:

Request for Records-Service Records, Transcripts, Certifications

Complete an exit interview with your principal/department

Update your address/email in Employee Self Service to ensure end of year documents are received

*\*Maintain Username/Password for future log-ins*

Contact Benefits office for insurance inquiries: [benefits@pearlandisd.org](mailto:benefits@pearlandisd.org)

Keys and Employee ID returned to campus contact

Turn in all technology equipment to campus contact

Office/classroom/workspace clear of personal items by agreed upon date

Uniforms and other district property returned

*Please note: In most cases, employee email, Skyward and all other technology access will be deactivated immediately following your last workday.*

- User Name: Pearland ISD Network Username (without the "@pearlandisd.org")

- \_\_\_\_\_
- Password: Pearland ISD Network Password
- \_\_\_\_\_