

**LONGVIEW SCHOOL DISTRICT NO. 122**  
**Notification of Intent to Separate Employment**

<b>Legal Name</b>		<b>Employee ID</b>	
<b>Position</b>		<b>Building</b>	
<b>Primary Phone</b>		<b>Second Phone</b>	
<b>Address</b>			
<b>City/State/Zip</b>			
<b>Personal Email*</b> -- REQUIRED --			

*\*Employees who have spouses who are current or former employees of the district must provide an email address not shared with their spouse.*

**Please accept this completed form as notification to terminate my employment with the Longview School District.**

- I am RETIRING** *I will immediately begin receiving my defined benefit allowance from the Department of Retirement Systems (RCW 41.40.010(32) 41.41.010(33)).*
- *If you have worked the full contract year and wish to continue to receive your 12-months of SEBB benefits, the date of separation must be in August, thereby delaying retirement benefits until September 1.*
  - *To begin drawing retirement benefits the month after the last date worked, the date of separation must be the last date worked and SEBB benefits will end the same month.*
- I am RESIGNING** *I don't meet the qualifications to retire at this time, OR I am delaying receiving my defined benefit allowance from the Department of Retirement Systems.*
- *If you have worked the full contract year and wish to continue to receive your 12-months of SEBB benefits, the date of separation must be in August, however this does not require any work to be performed in the next school year.*

<b>Last Day of Work:</b>	<b>Separation Date:</b> <i>(see above)</i>
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**Do you wish to be considered for the Substitute List?**  **Yes**  **No**  
*You will receive email notification concerning your request.*

*Per the Department of Retirement Systems, employees who wish to substitute after retiring must wait 30 consecutive days after the date of separation (not last day worked).*

\_\_\_\_\_  
 Employee Signature Date Director of Human Resources Date

**-- Submit completed form to Human Resources --**

<b>FOR HUMAN RESOURCES USE ONLY</b>		
<b>Substitute Request - <input type="checkbox"/> Approved <input type="checkbox"/> Denied (Staff Initials _____)</b>		
<input type="checkbox"/> Processed EA	<input type="checkbox"/> Sent Footprints	<input type="checkbox"/> Notified Substitute Services
<input type="checkbox"/> Notified building	<input type="checkbox"/> Personnel Report	<input type="checkbox"/> Process File
<input type="checkbox"/> Employee Card	<input type="checkbox"/> Employee Card	<input type="checkbox"/> Termination List
<input type="checkbox"/> Immunization List	<input type="checkbox"/> Seniority List	<input type="checkbox"/> Retirement Social List

# General Retirement Facts

## Retiring versus Resigning

**Retiring** means separating from all service and immediately begins receiving a Defined Benefit (DB) allowance (pension check) from the Department of Retirement Systems.

**Resigning** is when an employee leaves covered employment and

- does not qualify for retirement benefits, or
- delays receiving their Defined Benefit allowance.

The reason many employees delay receiving their DB is because of the age requirements for unreduced retirement benefits. Drawing their DB at the time they leave employment would result in a reduction of monthly benefits. To avoid this reduction, the employee will delay retiring until they reach the age where they can receive unreduced benefits. If you are delaying your Defined Benefits, the *Notification of Intent to Terminate Employment* form that you complete in Human Resources should say resigning, not retiring.

The basic rule of thumb for an employee to draw unreduced Defined Benefits is age 65 for Plan 2 and 3 members (exceptions if have over 30 years of service credit) and age 55 for Plan 1 members.

If you have any questions about whether you are retiring or resigning according to the definitions above, please contact **Tiffany Peone** in Payroll or the Department of Retirement Systems at 1-800-547-6657.

### References:

RCW 41.40.010 (33)

Definitions. "Retirement" means withdrawal from active service with a retirement allowance as provided by this chapter.

## Payroll Facts at time of Retirement or Resignation

### Final Pay Check:

- If you complete your contract year, your last pay check will be as a normal year e.g. teacher's contract work date ends in June, but your last pay check will still be in August .
- If you terminate prior to your last contract work date, payroll will prorate your salary and issue your final paycheck accordingly.

### Cash Outs to VEBA:

- Eligible cash out payments will be made on the month following your final contract pay.
- Eligible sick leave and vacation cash outs will be done automatically by payroll.
- A sick leave cash out form will be sent to you by the HR Payroll Manager. It must be returned to the HR Payroll Manager by August 31<sup>st</sup> or within 60 business days of your termination date, whichever comes first.
- No form is necessary for Vacation Cash Outs.
- Contact the HR Payroll Manager, Tiffany Peone, with any questions on cash outs to VEBA.

### VEBA (Voluntary Employees' Beneficiary Association)

- The VEBA Plan is a tax-free health reimbursement arrangement (HRA) that enables your employer to make tax-free contributions into a special trust account on your behalf. These tax-free funds can then be used to pay or reimburse eligible out-of-pocket healthcare costs and premiums for yourself, your spouse and your qualified IRS dependents.
- Whether you participate in VEBA or not, and which types of Cash Out's go into VEBA is a negotiated item between each individual Collective Bargaining Agreement and Management. Refer to your CBA to see what Cash Out's qualify to go into a VEBA Account.
- If your union participates in the VEBA program the cash out funds will be sent to VEBA and you will be contacted by VEBA to finalize setting up your account. VEBA contact info: 1-800-422-4023 [www.VEBA.org](http://www.VEBA.org).

### Medical / Dental / Vision Benefits:

- If you complete your contract year, your medical/dental/vision benefits will end on August 31<sup>st</sup>.
- If you terminate prior to your last contract work date, your benefits end on the last day of the month you terminate.
- The Health Care Authority is required by law to send you a COBRA Letter, giving you the option of continuing your SEBB benefits. You are responsible for paying 100% of the monthly premium.
- All Retirees and some Plan 3 members who are resigning may qualify for PEBB Medical Insurance. Contact PEBB directly to see what your options are. 1-800-200-1004 or [www.pebb.hca.wa](http://www.pebb.hca.wa)

### Flex Plan

- If you are currently enrolled in Flex Plan, you have the option to stop it at the time of your retirement/resignation, or to continue it through the end of the calendar year. The HR Payroll Manager will notify you of your options.

### Retirement

- Once an employee meets the minimum requirements for their plan, and is ready to retire, they will need to contact the Department of Retirement Systems to request an official estimate of their monthly benefit 3-6 months in advance.

Department of Retirement Systems  
PO Box 48380  
Olympia, Washington 98504-8380  
1-800-547-6657

For additional information, contact the Payroll Department:

Tiffany Peone	360 575-7171	Sandra Doherty	360 575-7170
Michelle Ehrlich	360 575-7166	Taylor Eden	360 575-7192



## **TECHNOLOGY ACCESS**

As you prepare for your upcoming retirement or resignation, please keep in mind—

- Access to the district's network and e-mail system will be disabled on—or shortly after—the effective date of your retirement/resignation from the district.
- Any documents or materials you wish to retain for your personal use should be copied onto your personal thumb drive or CD.
- Any documents that were stored on your desktop will be permanently deleted when your account is inactivated. They cannot be retrieved.
- Documents stored in your “my documents” folder will be retained by the district.
- Your e-mail address will be disabled. If you are interested in continuing to receive e-mails from some senders, please provide an alternate e-mail address to those senders.
- Your Skyward Employee Access will continue, but after your last day of work, you must reset your password by using the personal e-mail address listed on your retire/resign form.
- Please note that employees who have spouses who currently work, or formerly worked, in the district must provide an email address not shared with their spouse.

**[DRS Preparation Guidance Page Link](#)**

# Retirement planning checklist

This checklist will walk you through the steps you'll take to retire with DRS.



## ★ Start planning

- Sign up for an online account ([drs.wa.gov/oa](https://drs.wa.gov/oa)). Use your account to:
  - Verify the number of service credit years you have.
  - Calculate your retirement income through the Benefit Estimator.
- Review your plan for your retirement eligibility ([drs.wa.gov/plan](https://drs.wa.gov/plan)).

## 3-12 months before retiring

- Request an official estimate of your monthly benefit through your online account or by calling DRS.
- Complete payment for any optional service credit.

## 1-3 months before retiring

- Contact DRS if you need to make changes to your official estimate (for example, if you want to change your retirement date or survivor option).
- Apply for retirement through your online account.\* Include any additional requested information with your submission.
- If you have Plan 3 or DCP, decide when you want to begin receiving payments from your contributions. See your withdrawal options at [drs.wa.gov/plan3](https://drs.wa.gov/plan3) or [drs.wa.gov/dcp](https://drs.wa.gov/dcp). Contact the record keeper at 888-327-5596 with questions.
- Tell your employer your intended separation date.

## At and during retirement

- After you retire, we'll mail you a letter with your monthly benefit information. Make sure your information on the letter is correct.
- The same month you retire, you'll receive your first payment on the final business day of that month. If you don't receive your payment, contact DRS.
- When you receive your first monthly benefit payment, make sure the deductions on your statement are correct. Contact DRS if you have questions about any non-medical insurance deductions.
- Keep your current address and beneficiary information up-to-date with DRS. Enjoy retirement!

\*Members of more than one plan will need to contact DRS to apply.

## Tips for a better retirement

### 2-20 years before retirement

- Sign up for DCP to save even more for retirement. Over 50? DCP has a catch up savings option for you ([drs.wa.gov/dcp](https://drs.wa.gov/dcp)).
- Review your options for restoring or purchasing service credit to increase your benefit ([drs.wa.gov/sitemap/service](https://drs.wa.gov/sitemap/service)).

### 1-2 years before retirement

- Register for a retirement webinar at [drs.wa.gov/webinars](https://drs.wa.gov/webinars). This is a great way to get an overview of the retirement process and ask questions.
- Want to increase your retirement income? Explore your options at [drs.wa.gov/annuity](https://drs.wa.gov/annuity) or contact us.
- Plan for health care in retirement. Find out which options are available to you. Your employer may have additional information for you.

### 3-12 months before retirement

- If you'll be covered by the Public Employees Benefits Board (PEBB) program health insurance, contact PEBB services.
- Decide when to apply for Medicare and Social Security retirement benefits.

### 30-90 days before retirement

- If you'll be using PEBB health care, now is the time to send in your coverage election form.
- DCP customers, contact DRS to find out if you can apply any unused leave toward your account.

**Call DRS 800.547.6657**

**Plan 3 or DCP contributions 888.327.5596**

**PEBB: [hca.wa.gov](https://hca.wa.gov)**