



Exiting Employee Information Guide

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EXITING EMPLOYEE INFORMATION GUIDE

This Exiting Employee Information Guide has been assembled to assist you as you conclude your employment in the Alief 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 want to remind you of your obligations as a former employee of Alief ISD under the Educators’ Code of Ethics located in Policy DH (exhibit). As you know, your employment with the Alief ISD places you in a position of trust within our organization and allowed 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.

Your opinion about your experience with Alief ISD is important to us! An Exit Survey will be sent to you via e-mail. Information obtained during the Exit Survey is used to determine how Alief ISD can better serve employees. So please, take the time to complete it for us.

We’ve 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.

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

YOUR RESPONSIBILITIES

⇒ Submit your Letter of Resignation

An employee who desires to voluntarily resign or retire from the District should submit a Resignation/Retirement Form to his or her supervisor at least two weeks in advance of the intended resignation/retirement date. Earlier is preferred so the vacant position can be posted. You should indicate whether you are retiring through TRS. If you would rather write a personal letter of Resignation/Retirement, you should include the following:

- ◆ Date you write the letter
- ◆ Your last day of work
- ◆ Your signature
- ◆ Your permanent email address
- ◆ If the resignation is an end of year resignation, please indicate whether you are working summer school.

You can obtain the Resignation/Retirement Form from the campus or department secretary. There is also a blank Resignation/Retirement form at the end of this packet.

⇒ Return District Property

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

- ◆ Identification badge and parking tag
- ◆ Cellular phone/pager
- ◆ All keys
- ◆ Computers and electrical equipment
- ◆ Equipment provided for home or travel use
- ◆ Files, folders, manuals and/or records
- ◆ Uniforms
- ◆ Tools, safety belts, shoe covers and any other Alief property including intellectual property
- ◆ Any other school property
- ◆ Repay any outstanding money

If district property items are not returned, the cost for those items may be deducted from your last pay check.

⇒ Risk Management

Upon receipt of your separation letter in Human Resources, Risk Management will send you a separation notice with insurance information.

- ◆ Complete and return the forms to Risk Management
- ◆ Risk Management will contact you regarding your Health Benefits and Local Leave Deferral Plan if eligible. Follow the directions in the packet and submit any documentation in a timely manner.
- ◆ Call and verify your information was received in Risk Management.

⇒ **Complete the Exit Survey**

An Exit Survey will be e-mailed to your personal e-mail account. The information obtained from this survey is used to determine how Alief ISD can better serve employees, so please take the time to complete it for us.

⇒ **Elect Cobra Continuation Coverage if you need to extend your benefits coverage**

You have sixty (60) days after your benefits expire to elect Cobra Continuation Coverage. You will receive a notice in the mail offering COBRA continuation coverage to you and your qualified beneficiaries. This coverage is temporary and generally lasts for 18 months due to employment termination. If you have any questions about COBRA continuation coverage please contact the Alief ISD Risk Management Department at 281-498-8110, ext. 29145.

⇒ **Employee Online**

Employee Online can be accessed on the district website at www.aliefisd.net and then going to STAFF RESOURCES and then clicking on Employee Online. It is very important to keep your address and other information current in this location so your paychecks and other important documents will be sent to the correct location.

⇒ **Request Service Records**

- ◆ Please contact one of the Human Resources Records Specialists below and they will help you with getting your service record.
 - * Petrina (Trina) Andrews ext. 29160
 - * Kathy Cole ext. 29159
 - * Julian Alexander ext. 29161

If the resignation is at the end of the year, please be advised that services records will be available Mid to Late July of that summer.

⇒ **Returning of Original Documents in Personnel Folder**

- ◆ If you there are original documents in your personnel folder such as Original Transcripts or Original Non Alief Service Records, they will be returned to you. Along with the originals, you will receive a Return of Records form which employee must sign and return acknowledging receipt of original documents and a Release of Liability form. Both should be turned in to Human Resources upon receipt of original documents.

WHAT HAPPENS WITH MY FINAL PAY?

Final Pay

During the school year, the employee will receive their final pay after their last day of employment. If you wish to have an estimate of your final pay/paycheck, contact your records specialist.

When an employee who has used more sick leave than he or she accumulated ceases to be employed by the District, the cost of the unearned leave days shall be deducted from the employee's final paycheck.

Your check will continue to be direct deposited if that was the status at the time of your resignation/termination.

WHAT HAPPENS TO MY LEAVE BALANCES?

Payment of Leave at Retirement

An employee who earns local leave and retires from the District shall be eligible for reimbursement for local leave under the following conditions:

- ◆ The employee's retirement is voluntary, i.e., the employee is not being discharged or non-renewed.
- ◆ The employee is eligible for full retirement benefits under the Teacher Retirement System of Texas (TRS).
- ◆ The employee has at least five continuous years of regular service with the District.

The employee shall be reimbursed for each day of local leave, to a maximum of 80 days, in accordance with the following:

| <u>Years of Service</u> | <u>Percent Rate of Payment</u> |
|-------------------------|--------------------------------|
| 30 | 100 |
| 25–29 | 90 |
| 20–24 | 80 |
| 15–19 | 75 |
| 10–14 | 70 |
| 5–9 | 65 |

A contractual employee's rate of pay for unused local leave shall be based on the employee's average daily rate of pay for the final three years of service.

A non-contractual employee's rate of pay for unused local leave shall be based on the employee's average daily rate of pay for the final three years of service.

Payment shall be made after 45 days from the date of retirement, as verified by TRS, but no later than six months from the date of retirement.

Remaining Leave at Resignation

Any earned and unused state leave accumulated prior to resignation will appear on your service record and will be honored at any Texas public school district. Any earned and unused local leave is forfeited and will **NOT** be available for use if you return to the district.

WHAT HAPPENS TO MY BENEFITS?

Employees Who Terminate Prior to the End of Their Contract

If an employee terminates employment with the District before completing the number of work days assigned, the insurance and benefits will end at midnight on the last day of the calendar month in which the termination is effective.

Employees Who Terminate On or After Last Day of Their Contract

For those employees that have terminated employment at the end of their contract, you will be contacted by the Risk Management Department to choose your benefits termination date.

- **Medical – COBRA Continuation Coverage**

An employee may choose to keep their current benefit coverage longer by enrolling in a COBRA (Consolidated Omnibus Budget Reconciliation Act of 1985). Under COBRA, the employee and all dependents that were covered on the Alief Medical Plan, while actively at work, may continue that same coverage for up to 18 months if elected. Once the employee's termination has been processed in our system, an election packet will be sent to them from PayFlex Systems for the COBRA coverage.

- **Dental & Vision – COBRA Continuation Coverage**

Employees can also elect to have COBRA coverage for their Dental and Vision. Once the employee's termination has been processed in our system, an election packet will be sent to them from PayFlex Systems for the Dental and Vision COBRA coverage.

Employees have a 60-day election period from the termination date to make decisions on COBRA continuation coverage. If an employee is interested in continuing coverage, they should complete and return the necessary forms as soon as possible to the appropriate coverage administrator. Once payment is received, insurance coverage will be retroactively effective the day after their benefits expired from the district.

COBRA Administrator for Medical, Dental & Vision:

PayFlex Systems, 1-888-678-7835

www.payflex.com

- **Flexible Spending Accounts (FSA) and Dependent Care Spending Account (DCSA)**

The use of the Flex Account and Dependent Care Account will continue through the employees' benefits termination date. If an employee has any unused balances in their Medical FSA account and/or their Dependent Care account, they can be reimbursed for eligible expenses incurred prior to the termination date.

- **Portable Benefits**

If an employee is wanting to continue any of the benefits they currently have, they can contact the provider directly to set up their continuation of coverage. Below is a list of our current benefits that are portable with the contact information:

| | | |
|-----------------------------|-------------------|---------------------|
| Group Critical Illness Plan | MetLife | 800-438-6388 |
| Cancer Plan | Allstate | 800-521-3535 |
| Voluntary Group Term Life | Dearborn National | 281-498-8110 |
| Individual Life Insurance | Texas Life | 800-283-9233, ext 2 |
| Identity Theft Plan | iLOCK360 | 855-287-8888 |
| Legal Plan | MetLaw/Hyatt | 800-821-6400 |

- **403(b) Account**

The money an employee contributes to a 403(b) retirement account is always their money, regardless of how long they have worked for Alief ISD. There are several things that an employee can do with their 403(b) account after leaving the district.

- ✓ Leave it with the current 403(b) vendor; contributions can no longer be made through the district
- ✓ Roll it over to a traditional IRA account
- ✓ Transfer money from one 403(b) account to another to consolidate the funds
- ✓ Cash Distribution – Taxes may be withheld and penalties charged

You can contact TCG Services at 1-800-943-9179 if you have any questions about your 403(b) accounts. Website: www.tcgservices.com .

- **457 Account**

The money an employee contributes to a 457 retirement account is always their money, regardless of how long they have worked for Alief ISD. There are several things that an employee can do with their 457 account after leaving the district.

- ✓ Transfer your vested account balance to another tax-advantaged plan that accepts rollovers
- ✓ Take a lump-sum or partial distributions

- ✓ Elect monthly, quarterly or annual installment distributions
- ✓ Defer distributions until a later date (but no later than attainment of age 70 ½)

You can contact TCG Services at 1-800-943-9179 if you have questions about your 457 accounts. Website: www.tcgservices.com .

TEACHER RETIREMENT SYSTEM OF TEXAS

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* for (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 and 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 instruction 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 have questions regarding retirement, please contact TRS at 800-223-8778

If You are Leaving Employment But Not Retiring:

If you are leaving employment but aren't retiring, you have three options:

- ✓ Leave your contributions in your plan.
- ✓ You may terminate TRS membership by applying for a refund and withdrawing your account, but defer receipt of taxable income by rolling your funds over to another qualified plan or traditional Individual Retirement Account (IRA).
- ✓ You may request a refund of your TRS member contributions by completing and submitting an Application for Refund form (TRS 6) to TRS.

If you wish to withdraw your Teacher's Retirement, you can call 1-800-223-8778, or go online to www.trs.texas.gov to obtain the forms. The above information is as accurate as the district can determine. TRS Updates regulations quite frequently and TRS always has the most up-to-date information.

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.

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

For more information about working after retirement refer to Teacher Retirement System of Texas Employment After Retirement Brochure located under the Retirees and Beneficiaries section at www.trs.texas.gov .

ALIEF ISD CONTACTS

| SERVICE RECORDS/TRANSCRIPTS | | |
|------------------------------------|---------------------|------------|
| Rosa Martinez | HR Supervisor | Ext. 29158 |
| Trina Andrews | HR Specialist | Ext. 29160 |
| Kathy Cole | HR Specialist | Ext. 29159 |
| Julian Alexander | HR Specialist | Ext. 29161 |
| PAYROLL & TRS-7 | | |
| Linda Rubalcaba | Payroll Specialist | Ext. 29176 |
| Cathleen Wilson | Payroll Specialist | Ext. 29177 |
| BENEFITS | | |
| Michelle Mirshak | Benefits Manager | Ext. 29145 |
| LOCAL LEAVE PAYOUT | | |
| Sam Willis | Benefits Specialist | Ext. 29146 |



Human Resources Department

RESIGNATION FORM

RETIREMENT FORM

Important Information: Completion of this form indicates your voluntary resignation/retirement from Alief ISD (not just your campus/department). Do not complete this form if you will transfer to another work location or campus.

Today's Date: _____

Name: _____ SS #: _____ Employee ID: _____

Campus/Department: _____ Position currently assigned to: _____

I submit my resignation/retirement from employment with AISD effective _____. This will be my last day reporting to work. I am leaving the District because _____

Your final employment information such as COBRA and service records/transcripts will be mailed; therefore, please provide an updated address below.

Permanent Address (COBRA information will be mailed to this address)

Street _____ City _____ State _____ Zip _____

Telephone Number: _____ Personal E-mail address: _____

Signature: _____

My signature above acknowledges I understand and will comply with the following:

- Permanent Address is required to receive official communications from the District, final paycheck, and other documents I request
- I will return all District property
- Contact Risk Management regarding benefits coverage

Principal/Manager Acknowledgment: _____ Date: _____

Received in Human Resources: _____ Date: _____

FOR HR USE ONLY: *****

| | |
|---------------|----------|
| SS# | |
| Subject/Grade | |
| Last pay date | Benefits |
| # of days | E-mail |
| Agenda | Sub |

LETY _____ MELISSA _____

LIST _____ PA _____ BPLUS _____

HD _____ DOB _____

RISK MANAGEMENT: BS MR LT