



# **FRIENDSWOOD ISD**

## **Exiting Employee Information Guide**

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## **EXITING EMPLOYEE INFORMATION GUIDE**

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This Exiting Employee Information Guide has been assembled to assist you as you conclude your employment in Friendswood 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 Friendswood ISD under the Educators' Code of Ethics located in Policy DH. As you know, your employment with Friendswood 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.

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.

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

## YOUR RESPONSIBILITIES

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### 📌 Submit your Letter of Resignation

An 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. You should indicate if you are retiring through TRS. The following should be included on your Letter of Resignation:

- Date you write the letter
- Your last day of work
- Your signature
- Permanent email address

*Please see the sample resignation letter on page 10 or you may also access it here:*

<https://www.myfisd.com/fs/resource-manager/view/9c5a0fbc-e392-4936-aa7d-6e1d0d373b6b>

### 📌 Return District Property

The following items must be returned to your Supervisor or designee before your departure from the school district:

- Parking permit, identification badge
- All keys, including keycards
- Computers and electrical equipment
- Equipment provided for home or travel use
- Files, folders, manuals and/or records
- Any other school property, including uniforms
- Repay any outstanding district debt

### 📌 Complete the Exit Interview Survey

Your opinion is important to us! Please go to the following link to complete the survey:

<https://goo.gl/forms/VLpUQj8h6oLVc3kt1>

### 📌 Elect Cobra Continuation Coverage if you need to extend your benefits coverage

Employees have sixty (60) days after their benefits expire to elect Cobra Continuation Coverage. They will receive two packets in the mail from the District's COBRA Administrators.

- **Medical – TRS ActiveCare** Bswift 1-833-682-8972
- **Dental & Vision** FBS 1-800-583-6908

### 📌 Request Service Records

To request your Service Records click on the following link: <https://www.myfisd.com/fs/resource-manager/view/815f5f52-14c0-4d12-8f19-0cf832d8b872>

and email completed form to [spulido@fisd12.net](mailto:spulido@fisd12.net)

A copy of the Fisd service record will be emailed to you for signature, verifying the information is correct. Once the signed copy is returned to Fisd, all originals will be mailed to the address on the request form.

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

### 📌 Employee Access Center

Employee Access can be accessed from Skyward Finance located on the District website at [www.myfisd.com](http://www.myfisd.com)

Employee Access will provide you with the following important information:

- 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 your Professional Development records in EduPhoria

Email Technology at [helpdesk@fisd12.net](mailto:helpdesk@fisd12.net) requesting your professional development records in EduPhoria be exported.

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

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### **FINAL PAY**

If an employee's departure from Fisd is between the 1<sup>st</sup> and the 15<sup>th</sup> of the month, they can expect payment on the 5<sup>th</sup> of the following month, if their departure is between the 16<sup>th</sup> and the end of the month they can expect payment on the 20<sup>th</sup> of the following month. Please note that there can be exceptions to this rule, and we will make every effort to make the final payment promptly.

If an employee completes their assignment or contract, then pay will run through the 5<sup>th</sup> or 20<sup>th</sup> of August; depending on the length of the contract or assignment. In order to draw summer pay in a lump sum payment on June 20<sup>th</sup>, an employee must be terminating employment and request the payoff, in writing, to the Human Resources department by June 1<sup>st</sup>.

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

The final check will be Direct Deposited. The only exception is if the Business Office is asked to hold the check for personal pick up pending return of district property.

### **ACCESS TO PAYROLL CHECK STUBS AND W2 INFORMATION**

Employee Access in Skyward Finance will remain active until February 15<sup>th</sup> of the year following separation, for income tax information. This is located at [www.myfisd.com](http://www.myfisd.com). Exiting employees will be able to view payroll check stubs as well as W-2 information.

## **WHAT HAPPENS TO MY LEAVE BALANCES?**

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### **PAYMENT OF LEAVE AT RETIREMENT**

An employee who takes full service retirement with the Texas Teacher Retirement System (TRS) with a combination of age and service years equal to 80 or more shall be compensated for accumulated local sick leave accrued while employed by the District at 50 percent of the rate of his or her daily wage at the time of retirement. A retiring employee may be compensated for no more than the number of workdays for one contract year or for the number of duty days specified for the position, whichever is appropriate.

An employee who takes reduced service retirement with TRS, shall be compensated for up to 100 days of local sick leave accrued while employed by the District at the rate of the daily wage of a substitute in effect at the time of retirement.

### **REMAINING LEAVE AT RESIGNATION**

Any state leave accumulated prior to resignation will appear on your service record and will be honored at any Texas public school district. Local leave remains with the district and will be made available for use if you return to the district.

## **WHAT HAPPENS TO MY BENEFITS?**

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### **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 to their contract, 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 on or after the last day of their contract, the District will terminate the benefits on August 31 of that calendar year.

- **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 TRS ActiveCare 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 Aetna-Bswift for the COBRA coverage. The cost is 102% of the premium, which is the full premium rate plus a 2% administrative fee. The employee will remit their premiums directly to the COBRA administrator.

- **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 FBS-Financial Benefit Services for the Dental and Vision COBRA coverage. The cost is also 102% of the total premium, which is the full premium rate plus a 2% administrative fee. The employee will remit their premiums directly to FBS 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:**

##### **Bswift COBRA Department**

P.O. Box 2780

Omaha, NE 68103-2780

1-833-682-8972

#### **COBRA Administrator for Dental & Vision:**

##### **FBS – Financial Benefit Services**

2175 N. Glenville Drive

Richardson, TX 75082

1-800-583-6908

[www.FBSBenefits.com](http://www.FBSBenefits.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. NBS: 1-800-274-0503    [www.nbsbenefits.com](http://www.nbsbenefits.com)

- **Health Savings Accounts (HSA)**

If an employee has a balance in an HSA those funds will not be lost. The existing HSA card will be closed and a new debit card will be sent to the employee so they are able to use the funds in their HSA for eligible medical expenses. NBS: 1-800-274-0503    [www.nbsbenefits.com](http://www.nbsbenefits.com)

- **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:

|                   |                       |              |  |
|-------------------|-----------------------|--------------|--|
| Accident          | The Hartford          | 877-248-5077 | <a href="http://www.thehartfordatwork.com">www.thehartfordatwork.com</a>   |
| Cancer            | American Public Life  | 800-521-3535 | <a href="http://www.ampublic.com">www.ampublic.com</a>                     |
| Critical Illness  | UNUM                  | 866-679-3054 | <a href="http://www.unum.com">www.unum.com</a>                             |
| Medical Transport | MASA                  | 800-423-3226 | <a href="http://www.masamts.com">www.masamts.com</a>                       |
| Life Insurance    | 5 Star Life Insurance | 866-863-9753 | <a href="http://www.5starlifeinsurance.com">www.5starlifeinsurance.com</a> |
| Life Insurance    | Texas Life            | 800-283-9233 | <a href="http://www.texaslife.com">www.texaslife.com</a>                   |

- **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 Fisd. 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
- Rollover 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 Administrators if you have any questions about your 403 (b) accounts.

1-800-943-9179

Website: [www.tcgservices.com](http://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 Fisd. 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 1/2)

You can contact TCG Administrators if you have questions about your 457 accounts.

1-800-943-9179

Website: [www.tcgservices.com](http://www.tcgservices.com)

## **TEACHER RETIREMENT SYSTEM OF TEXAS**

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### **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 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.
  - ▶ If you have less than five years of TRS service credit, you may leave your accumulated contributions with TRS, receive interest for up to five years while absent from TRS-covered employment and then later apply for a refund if you do not continue or return to employment with a TRS-covered employer. The interest rate is currently two percent.
  - ▶ If you have at least five years of TRS service credit you may leave your accumulated contributions with TRS and earn interest as long as these funds remain with TRS. The interest rate is currently two percent. When you meet applicable age requirements you may apply for a retirement annuity based upon your service and salary history on file with TRS at the time your employment terminated.
- 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](http://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. Please note that 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](http://www.trs.texas.gov)



## Friendswood Independent School District Separation Check List

- Resignation/Retirement letter turned in to Human Resources: [lfoley@fisd12.net](mailto:lfoley@fisd12.net) Sample resignation letter: <https://www.myfisd.com/fs/resource-manager/view/9c5a0fbc-e392-4936-aa7d-6e1d0d373b6b>
- If retiring, turn in *current* TRS statement of member account to HR with letter of retirement TRS 7 turned in to Linda Haddock, Payroll Coordinator, if retiring: [lhaddock@fisd12.net](mailto:lhaddock@fisd12.net) Notify Chrissy Lutz, if retiring: [clutz@fisd12.net](mailto:clutz@fisd12.net)
- Records request completed:  
<https://www.myfisd.com/fs/resource-manager/view/815f5f52-14c0-4d12-8f19-0cf832d8b872>
- Email to: [spulido@fisd12.net](mailto:spulido@fisd12.net)
- Permanent address and email address provided via FISD Exit Survey (see link below)
- FISD Exit Survey completed <https://goo.gl/forms/VLpUQj8h6oLVc3kt1>
- Email technology at [helpdesk@fisd12.net](mailto:helpdesk@fisd12.net) to request an export of your professional development records from Eduphoria
- Update your email in EduHero to your new district or personal email to retain access
- Contact Benefits office if necessary: [kkempken@fisd12.net](mailto:kkempken@fisd12.net)
- Notified of my right to continuation of health insurance under COBRA
- Keys and Employee ID returned to campus contact
- All technology equipment turned in 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 Student and all other technology access will be deactivated immediately following your last work day. However, your employee access in Skyward Finance will remain active until February 15<sup>th</sup> of the following year for income tax information. Also, if you need records from Eduphoria or EduHero please export all data before your last work day.*

## SAMPLE RESIGNATION LETTER

Date: \_\_\_\_\_

To: Campus Principal/Supervisor Name here

{Body of letter must include whether you are resigning or retiring. Body of letter must include last day you will work. If you are retiring, it must include retirement date, which could be different from last day worked.}

Sincerely, \_

Your Signature

Your Name

At the bottom of the letter, you must include:

Permanent Address: \_\_\_\_\_

Permanent Phone Number: \_\_\_\_\_

Personal Email Address: \_\_\_\_\_

## FISD CONTACTS

| HUMAN RESOURCES              |   |  |
|------------------------------|---|--|
| Lindsey Foley                | <i>Executive Director of HR</i>                       | (281) 996-6620<br><a href="mailto:lfoley@fisd12.net">lfoley@fisd12.net</a>   |
| Susan Pulido                 | <i>HR Specialist</i>                                  | (281) 996-6620<br><a href="mailto:spulido@fisd12.net">spulido@fisd12.net</a>   |
| Susan Pulido/<br>Hope Coburn | <i>HR Specialists for Auxiliary</i>                   | <a href="mailto:spulido@fisd12.net">spulido@fisd12.net</a><br><a href="mailto:hcoburn@fisd12.net">hcoburn@fisd12.net</a> |
| Hope Coburn                  | <i>HR Specialist for Substitutes</i>                  | (281) 996-6604<br><a href="mailto:hcoburn@fisd12.net">hcoburn@fisd12.net</a>   |
| PAYROLL                      |   |  |
| Linda Haddock                | <i>Payroll Coordinator</i>                            | (281) 996-6611<br><a href="mailto:lhaddock@fisd12.net">lhaddock@fisd12.net</a>   |
| Chrissy Lutz                 | <i>Compensation Analyst</i>                           | (281) 996-6622<br><a href="mailto:clutz@fisd12.net">clutz@fisd12.net</a>   |
| BENEFITS                     |   |  |
| Kimberly Kempken             | <i>Benefits &amp; Leave Coordinator/Worker's Comp</i> | (281) 996-6605<br><a href="mailto:kkempken@fisd12.net">kkempken@fisd12.net</a>   |