



Santa Fe ISD 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 Santa Fe 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 Santa Fe ISD under the Educators' Code of Ethics located in Policy DH (exhibit). As you know, your employment with the Santa Fe 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 SFISD is important to us. Information obtained during the Exit interview is used to determine how SFISD can better serve employees. Your input will remain anonymous. This face-to-face interview will be scheduled through HR.

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.

Santa Fe 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 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 whether you are retiring through TRS. The following should be included in your Letter of Resignation:

- Your last day of work
- Your Signature

➤ **Return District Property**

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

- Parking Permit, Identification Badge
- All Keys
- Computers and Electrical Equipment
- Equipment Provided for Home or Travel Use
- Files, Folders, Manuals and/or Records created either electronically or on paper
- Any Other School Property (Items/materials funded by SFTXEF Grants)
- Pay Any Outstanding Fees (Laptop, Tablets, SOAR, Creative Explorers, Nutrition Services)

➤ **Complete the SFISD Exit Benefits and Payroll Form**

This document can be filed electronically through Employee Access which can be found by copying and pasting the following link:

<https://www.sfid.org/cms/lib/TX02215329/Centricity/Domain/377/EXIT%20BENEFITS%20AND%20PAYROLL%20FORM%20-%20REV%20021417.pdf>

➤ **Complete the Exit Interview Survey**

Your opinion is important to us! To schedule a face-to-face exit interview, contact the Administrative Assistant for HR at 409-925-9032.

➤ **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 two notices in the mail from the District's Cobra Administrators.

PlanSource

8am – 11pm EST

Phone: 888-266-1732

Email: cobra@plansource.com

Mailing Address: PlanSource

PO Box 3850

Omaha, NE 68103

➤ **Keep your Address on File Current**

Please update your address and phone numbers through Employee Access. Employee Access can be easily accessed from the District website at www.sfid.org.

Employee Access will provide you with the following important information:

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

EXIT EMPLOYEE FORMS

Go to SFISD.org and click on “Departments-HR-Employees” and then “[Exiting Employee Information](#)”. To request a copy of your service records, complete a [Service Records Request](#). A link can also be found on the HR webpage.

WHAT HAPPENS WITH MY FINAL PAY?

Final Pay

If your departure from SFISD is between the 1st and the 15th of the month, you can expect payment on the 10th of the following month, if your departure is between the 16th and the end of the month you can expect payment on the 25th of the following month. Please take note that there can be exceptions to this rule, and we will make every effort to make your final payment as prompt as possible. Please see current payroll calendar by visiting our website at www.sfisd.org. Click on Departments, Business then Payroll.

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.

Your check will continue to be Direct Deposited if that was the status at the time of your resignation/termination, if not, your check will be mailed to the address we have on file.

Access to Payroll Check Stubs and W-2 Information

You may access Employee Access online indefinitely after leaving SFISD. This is located at www.sfisd.org. You will be able to view payroll check stubs as well as W-2 information. You may also use Employee Access to change your mailing address. Please note that W-2’s are no longer mailed. They are only available through Employee Access.

WHAT HAPPENS TO MY LEAVE BALANCES?

Employees are not eligible for a payout of unused local leave, and that balance will be reduced to zero upon separation from the district. Employees may be eligible for a payout of unused state personal leave if certain criteria are met.

Payment of Leave at Retirement

Employees who take full-service retirement under TRS with a combination of age and service years equal to 80 or more may be compensated for accrued state personal leave days earned while employed by the District. The compensation shall be 50 percent of the employee's daily rate, based on current assignment for those employees who have ten or more years of service with the District. Teachers and Professional daily rates are not to exceed \$100.00 per day, and Administrator daily rates are not to exceed \$225.00 per day. The maximum number of days that shall be compensated under this policy shall be 50.

To be eligible to participate, employees must meet the following criteria:

- 1) The employee's retirement is voluntary, i.e., the employee is not being discharged or non-renewed.
- 2) The employee must submit a written notice of resignation, including their request for reimbursement, to the Superintendent no later than March 1st of the current year with a retirement date of not later than June 30th of the same year.
- 3) The employee must work the entire school year or the required number of days established in their contract, whichever is greater.
- 4) Transfer days shall not be honored for purposes of this policy.

Accrued state personal leave days for which reimbursement is paid to the employee shall be deducted from employee's service record. The benefit will be paid to the employee in his/her June 25th paycheck upon confirmation from TRS of the employee's retirement.

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 work days 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 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.

Scheduled Number of Days for your position in School Year Work Calendar	Benefits End at Midnight on
212 Days or less	August 31
220-226 Days	June 30
260 Days	August 31

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 within 60 days of your receipt of the packet. You will then have an additional 45 days to remit the premium payment. 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 BSwift, which documents your prior coverage under Santa Fe ISD plan and may exempt you from a future plan's restrictions on pre-existing conditions.

Note: If you were not a participant in medical and/or dental/vision as an active employee, you will not receive the COBRA offering for extended medical and/or dental/vision benefits. 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.

The Cobra Administrator for Medical is:

PlanSource

8am – 11pm EST

Phone: 888-266-1732

Email: cobra@plansource.com

Mailing Address: PlanSource

PO Box 3850

Omaha, NE 68103

The Cobra Administrator for Dental, Vision and Flex is:

PlanSource

8am – 11pm EST

Phone: 888-266-1732

Email: cobra@plansource.com

Mailing Address: PlanSource

PO Box 3850

Omaha, NE 68103

WHAT HAPPENS TO MY HEALTH CARE FLEXIBLE 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, 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.

Health Savings Accounts (HSA)

If you have a balance in your HSA those funds will not be lost; you will be able to use your debit card to pay for eligible health care expenses.

If you remain covered under a High-Deductible Health Plan (HDHP), you can continue to access your HSA funds through individual coverage or you can "roll over" funds from SFISD's HSA program to another employer's program. Even if your new employer doesn't offer an HSA-compatible HDHP, you can keep the money in your HSA and continue to use the funds for qualified expenses. However, you can no longer add money to the account until you are again covered by an HDHP.

If you wish to move the funds to another account or have additional questions, call the telephone number listed on your HSA debit card.

WHAT HAPPENS TO MY CAFETERIA PLAN BENEFITS?

Please contact your Life Insurance Representative to discuss options regarding your Life Insurance policies. For questions regarding all other Cafeteria Plan policies contact:

PlanSource
8am – 11pm EST
Phone: 888-266-1732
Email: cobra@plansource.com
Mailing Address: PlanSource
PO Box 3850
Omaha, NE 68103

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* 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:

Chrissy Lutz, SFISD Payroll Specialist
(409) 925-9022
chrissy.lutz@sfisd.org

If you are leaving employment but aren't retiring

If you are leaving employment but aren't 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.

If you wish to withdraw your Teacher's Retirement, you can call 1-800-223-8778, or go online to www.trs.state.tx.us to obtain the forms.

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 TRS Publications section at www.trs.state.tx.us.

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 SFISD. There are several things that you can do with your 403(b) after leaving your job.

1. Leave your funds in the SFISD 403(b) plan.
2. Rollover your 403b into a Traditional IRA. Contributions to Traditional IRA's receive the same type of tax deferral treatment as contributions to 403b's, 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 Plan Connect.

457 Plan

The money you contributed to your 457 account is always yours, regardless of how long you have worked for SFISD. 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 JEM Resources.

OTHER THINGS TO KNOW AND DO

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.

CONTACT	POSITION	PHONE NUMBER
Tara Mata	HR Administrative Asst. Substitute Coordinator	(409) 925-9032
Lori Marks	HR Coordinator Certification Specialist Service Records Unemployment Specialist	(409) 925-9033
Brandy Meade	HR/PR Data Specialist	(409) 925-9030
Deani Quick	Intern Site Supervisor Mentoring Program	(409) 925-9036
Tammie Graem	District Receptionist	(409) 925-3526
Patti Hanssard	Asst. Supt. For Human Resources & Public Relations	(409) 925-9032
Jenny Davenport	Director of Human Resources & Public Relations	(409) 925-9038
Jewell Oneal	Payroll Specialist	(409) 925-9022
Alejandro Sanchez	Director of Finance	(409) 925-9029
Becky Wright	Coordinator for Benefits & Risk Management Worker's Compensation	(409) 925-9024
Marsha Banda	Systems Support	(409) 925-9018
Julia Vasquez	Administrative Assistant for Technology	(409) 925-9060
Kathy Oliver	SOAR	(409) 925-9052
Belinda Slawson	Director for Creative Explorers	(409) 927-3409
Kim Wulf	Nutrition Services	(409) 925-9070

TOPIC	CONTACT	PHONE NUMBER
Critical Illness Coverage	MetLife	800-638-5000
Cobra Continuation Coverage (medical)	Well Systems	844-752-5146
Cobra Continuation Coverage (dental, vision, flex)	Next Generation	877-297-1417
Flexible Spending Accounts	Next Generation	888-266-1732
Health Savings Accounts	Gulf Coast Educators FCU	281-925-4133
403(b) Savings Plan	Plan Connect	800-923-6669
457 Savings Plan	JEM Resources	800-943-9179
Life Insurance	MetLife (Payroll Deduction)	800-638-5000
Cincinnati Life Insurance	Joe Shadid	903-436-0919
Texas Life Insurance	Sherry Hitch	800-283-9233 ext. 6324
Retirement	Teacher Retirement System of Texas	800-223-8778
Retirement-general questions	SFISD Payroll Department	(409) 925-9022
Leave Balances	SFISD Benefits Department	(409) 925-9024
Final Paycheck	SFISD Payroll Department	(409) 925-9022
SFISD HR Contacts	SFISD Human Resources	(409) 925-9030
Exit Interview Questionnaire	SFISD Human Resources	(409) 925-9030
Service Record Requests	SFISD Certification Officer-Lori Marks	(409) 925-9033