

BISD Employee Separation Guide

Shannon Allen, Ed.D. Superintendent of Schools



It is the policy of the Beaumont Independent School District not to discriminate on the basis of race, color, national origin, gender, handicapping condition, or age in its programs, services, activities, or employment practices as required by Title VI of the Civil Rights Act of 1964, as amended; Title IX of the Education Amendments of 1972; the Age Discrimination Act of 1975, as amended; and Section 504 of the Rehabilitation Act of 1973, as amended. The Beaumont Independent School District is committed to providing a firee and appropriate public education for all students.

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EXITING EMPLOYEE INFORMATION

From the Office of Human Resources

Dear Beaumont ISD Team Members,

As a valued employee of the Beaumont Independent School District (BISD), it gives me great pride to express how important your service to the district has been. Preparing the next generation is our mission. The hard work, effort and support each member of the BISD Family provides to our students is truly appreciated. Our employees are the backbone of an outstanding school district with a tremendously bright future ahead. Although you are concluding your employment with the district, we hope that your time at BISD has been rewarding and fulfilling.

To assist you in transitioning out of the district, we have developed this Exiting Employee Information Guide. It provides information regarding termination procedures, final pay, benefits, and other pertinent information. This guide also includes a Resource List with contact information for persons you can call to field any questions you may have.

Because you're leaving the district, we want to remind you of your obligations as a former employee of Beaumont ISD under the Educator's Code of Ethics located in Board Policy DH. As you know, your employment with Beaumont ISD places you in a position of trust within our organization and allows you to have access to confidential student information. You have an obligation, even after employment with the District has ended, to maintain the confidentiality of the student information. Additionally, you are to refrain from using or disclosing any such information unless it serves lawful professional purpose or is required by law.

We have made every effort to ensure that the information enclosed in this guide is accurate and up to date. However, if there is a discrepancy between the benefit descriptions and the insurance contracts or other legal documents, the legal documents will always govern.

Thank you for doing your part in preparing our next generation by making every moment matter more!

Sincerely,

Derwin Samuels, Jr

Executive Director of Human Resources

YOUR RESPONSIBILITIES

✓ Submit your Letter of Resignation

An employee who desires to voluntarily resign from the District shall address the notice to the Superintendent, and submit it to the Office of Human Resources generally two (2) weeks in advance of the intended resignation date. You should indicate if you are retiring through TRS. Submitting this letter indicates that you are voluntarily resigning or retiring from the Beaumont Independent School District, not just from your campus/department.

If you are transferring to another school, department or position, do not submit a letter of resignation.

The following should be included in your Letter of Resignation:

- Date you write the letter
- Your last day of work
- Your signature
- Employee ID number
- Permanent email address
- Permanent mailing address

Please see the sample resignation letter on Page 11.

Resignation or Retirement during the current school year

A contract employee who desires to voluntarily retire from the District during the school year or resign after the 45th day before the first day of instruction of the following school year (penalty free date), should also submit the Letter of Voluntary Resignation/Retirement form on Page12 and appropriate documentation at least 45 calendar days prior to proposed release date in accordance with Board Policy DFF (LEGAL). DFF (LEGAL). Please see the Release from Contract information on Page 13.

✓ Return District Property

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

- 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 Report

✓ Complete the Exit Interview Survey

Your opinion is important to us! Please go to the following link to complete the survey. Exit Interview Form (Link must be opened in a browser other than google.)

✓ 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. Information will be mailed to you from the District's COBRA Administrators.

Medical Bswift, LLC 1-833-682-8972
 Dental & Vision National Benefits Services 1-800-274-0503

✓ Request Service Records

To request your Service Records, click on the following link: Service Records

✓ Employee Self-Service Center (TEAMS)

Employee Self-Service Center can be accessed from the Staff Portal located on the District's website at <u>Staff Portal</u>. Click on **Employee Self-Service Center (TEAMS).** The Employee Self-Service Center 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
- The current contact information on file with the District

✓ Request Professional Development records in Eduphoria

Follow steps in Leaving the District To-Do list for Professional Development on Page 16.

WHAT HAPPENS WITH MY FINAL PAY

Pay Upon Separation from the District

If an employee leaves Beaumont ISD before completing their calendar year assignment or contract, their final check will be disbursed according to the regular payroll calendar that can be accessed by clinking the applicable link below:

Non-Exempt Employees - <u>Non-Exempt Payroll Calendar</u> Exempt Employees - <u>Exempt Payroll Calendar</u>

If an employee separates from the district before the last duty day of the school year, the employee's final paycheck shall be reduced for:

- State personal leave the employee used beyond his/her pro rata entitlement for the school year; and
- Local leave the employee used but had not earned as of the date of separation.

If an employee uses more local leave than he/she earned and remains employed with the District through his/her last duty date, the District shall deduct the cost of the excess leave days from the employee's pay in accordance with administrative regulations.

Final pay checks are direct deposited.

ACCESS TO PAYROLL CHECK STUBS AND W-2 INFORMATION

Employee access to the Employee Self-Service Center is only available after separation from the District by going to the District website under the Human Resources Department. Click on Former Employees which opens the *Registering for the Employee Service Center after Separation* guide. Follow the steps given to register for a new account in the Employee Service Center to access former paychecks, W-2 forms and 1095-C forms. Please note, the District will mail W-2s to the employee's address that is currently on file.

WHAT HAPPENS TO MY LEAVE BALANCES?

PAYMENT OF LEAVEAT RETIREMENT

A full-time employee who was employed by the District before the 1996-97 school year shall be eligible for payment for accumulated state and local leave upon retirement under the Texas Teacher Retirement System (TRS) program.

The payment for leave accumulated beginning on June 1, 1994 shall apply only to state and local leave accumulated while employed by the District.

Eligible employees who had accumulated days in other districts prior to June 1, 1994, shall receive payment for all accumulated state and local days at the time of retirement according to the provisions in place prior to June 1, 1994.

The maximum payment shall be for one-half of the eligible accumulated leave days, at a rate of 100 percent of the employee's daily rate of pay at the time of retirement. Refer to Board Policy DEC (LOCAL) by clicking on the following link: Board Policy DEC (LOCAL)

REMAINING LEAVE AT RESIGNATION

An employee who chooses to resign, is not eligible to be paid out any earned State Personal leave, earned Local leave or Vacation time. However, the State days remain in the employee's leave bank indefinitely and will be available if the employee returns to Beaumont ISD or transfers to another school district in the State of Texas. The hours will be provided on a Service Record.

Any State leave accumulated prior to resignation will appear on the employee's service record and will be honored at any Texas public school district. Local leave and Vacation are zeroed out after the employee terminates employment or retires from the District.

WHAT HAPPENS TO MY BENEFITS?

Employees who Terminate Prior to the End of Their Assignment

If an employee terminates employment with the District prior to completing their number of assignment days or their contract, the employee's insurance and benefits will end at midnight on the last day of the calendar month is which the termination is effective.

Employees who Terminate on or After the Last Day of Their Contract End Date If an employee terminates employment on or after the last day of their contract, the District will terminate their benefits on August 31 of that calendar year.

Medical – COBRA Continuation Coverage

An employee may choose to active COBRA (Consolidated Omnibus Budget Reconciliation Act of 1985) benefits to keep their current benefit coverage longer. Under COBRA, the employee and all dependents that were covered on any of the District's Medical plans, while actively at work, may continue that same coverage up to 18 months if elected. Once the employee's termination has been processed in TEAMS, an election packet will be sent to the employee from Bswift or 90 Degree Benefits for the COBRA coverage. The cost is 100% of the premium plus a small admin fee. The employee must remit the premiums directly to the COBRA administrator.

• Dental, Vision and Flexible Spending – COBRA Continuation Coverage An employee may elect to continue their Dental and Vision coverage with COBRA coverage. Once the employee's termination has been processed in TEAMS, an election packet will be mailed to the employee from FBS for the Dental and Vision coverage. The cost of coverage is 100% of the total premium plus a small admin fee. The employee must remit the premium payment directly to FBS to activate the Dental and Vision COBRA coverage.

Employees have a 60-day election period from the date of termination of employment to decide on COBRA continuation coverage. If an employee decides to continue coverage, they should complete and return the necessary forms, as soon as possible, to the appropriate coverage administrator. Once the premium payment is received, insurance coverage will be retroactively effective to the day

after the benefits expired from the District. Following is contact information for the aforementioned COBRA carriers.

COBRA Administrator for Medical

Bswift – 833/682-8972 90 Degree Benefits – 888/803-0081

COBRA Administrator for Dental & Vision

FBS - 800/274-0503

Flexible Spending Accounts (FSA) and Dependent Care FSA

The use of Flexible Spending and Dependent Care Accounts will continue through the employee's benefits termination date. If an employee has any unused balances in their Medical FSA and/or Dependent Care FSA account, they can be reimbursed for eligible expenses incurred prior to the termination date. The administrator for those accounts is: FBS – 800/274-0503

Voluntary Benefits

If an employee desires to continue any of the voluntary benefits they currently have, they may contact the provider directly to set up their continuation of coverage. Following is a list of our current voluntary benefits providers with their contact information:

LIFE AND AD&D
AUL a OneAmerica Company
800/537-6442
www.oneamerica.com

EMERGENCY TRANSPORTATION

MASA 800/423-3226 www.masamts.com

CRITICAL ILLNESS UNUM 800/635-5597

www.mybenefitshub.com/beaumontisd

IDNETITY THEFT IDWatchdog 866/513-1518 www.idwatchdog.com HOSPITAL INDEMINITY

American Public Life

800/256-8606

www.ampublic.com

CANCER

American Public Life

800/256-8606

www.ampulic.com

TELEHEALTH

MDlive 888/365-1663

www.consultmdlive.com

ACCIDENT The Hartford 866/547-4205

www.thehartford.com/

403(b) Account

The money an employee contributes to a 403(b)retirement plan is always their money, regardless of how long they have worked for Beaumont ISD. There are several things 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 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

If you have any questions about your 403(b)account contact:

NBS Retirement Service Center 800/274-0503 ext. 5,2

■ 457(b) FICA Alternative Plan Account

The money an employee contributes to a 457(b)retirement account is always their money, regardless of how long they have worked for Beaumont 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-advantage 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 $70 \frac{1}{2}$)

If you have any questions about your 457(b)account contact:

NBS Benefit Services 800/274-0503

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. To begin the process, submit a completed *Request for Estimate of Retirement Benefits* from (TRS18) to receive a retirement packet. The form can be obtained from the *My*TRS 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. Here is the link to the TRS 18 form: TRS 18 Form

Once TRS receives your completed TRS 18 form, a retirement packet will be mailed to you with the forms you need to select your retirement date and your retirement payment plan. It is imperative that you follow the instructions in the packet to insure your paperwork is completed properly for processing. TRS will also need 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 be sure **your** social security number is on any birth certificate you submit.

If you have any questions regarding retirement, please contact TRS at 800/223-8778.

IF YOU ARE LEAVING EMPLOYMENT, BUT NOT RETIRING:

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

- Leave your contributions in TRS
 - ➤ If you have less than five (5) years of credited service with TRS, 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 entity.
 - ➤ If you have at least five (5) years of credited service with TRS you may leave your accumulated contributions with TRS and earn interest as long as these funds remain with TRS. When you meet the 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. Click on the link below for information regarding how to request a refund. <u>How to Request a Refund</u>

If you wish to withdraw your Teacher's Retirement, you may call 800/223-8778, or go online to www.trs.texas.gov to obtain the forms. TRS updates regulations quite frequently. They will always be the best source for the most up-to-date information.

WORKING AFTER RETIREMENT

Service retirees may work without limits 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 year after retirement before returning to the workforce. Please note, you must observe all TRS restrictions on negotiating for future employment, or you could revoke your retirement.

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

Beaumont Independent School District Separation Check List

- ✓ Resignation /Retirement letter addressed to the Superintendent and submitted to the Office of Human Resources. A copy may be given to your principal/supervisor. Sample resignation letter on Page 11
- ✓ Submit Request for Contract Release if appropriate: Page 14
- ✓ If retiring, turn in *Letter of Retirement* to the Office of Human Resources
- ✓ If retiring, submit TRS 7 to Mona Richard, HR Specialist: mrichar@bmtisd.com
- ✓ Permanent address and email address provided via Exit Survey, Beaumont ISD Exit Survey or Beaumont ISD Exit Survey (Española)
- ✓ To request professional development records, email Denise Shaffer at dshaff1@bmtisd.com.
- ✓ To reach the Benefits Office contact: Kristi Whitten at kwhitt@bmtisd.com.
- ✓ Notified of my right to continuation of health insurance under COBRA
- ✓ Keys returned to campus contact or the Office of Human Resources, if applicable
- ✓ Swipe card returned to campus contact
- ✓ Office/classroom/workspace cleared of all personal items by agreed upon date
- ✓ Uniforms and other district property returned to supervisor or the Office of Human Resources

Please Note:

In most cases, employee email, TEAMS and all other technology access will be deactivated immediately following your last day of work. If you are working summer school, please note that on their letter of resignation. Should you need records from Eduphoria or other software, please export all data before your last work day.

SAMPLE RESIGNATION LETTER

Date:
TO: Superintendent of Schools,
{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. If you are working summer school, indicate dates so computer and email access remains active.}
Sincerely,
Your Signature
Your Name Printed
Employee ID Number
At the bottom of the letter, you must include: Permanent Address:
Permanent Phone Number:
Personal Email Address:

LETTER OF VOLUNTARY RESIGNATION/RETIREMENT

Name:	
Campus/Dept:	Position:
Effective Date of Resignation	end of the contract period
Are you working summer school?	YesNo
I understand that my resignation/retirement is voluperiod or following acceptance from the Executive D	untary and irrevocable if at the end of my contract Director of Human Resources.
Reason for Leaving:	
Signature	Date
Printed Name	
Personal Email Address	Best Contact Telephone Number
Address if different from what is currently on file.	
DEPARTMENT OF HUMA	AN RESOURCES USE ONLY
Received by:	on:
Received in Human Resources by:	
Accepted by Executive Director of Human Resource	es:
On:	_
Denied by Executive Director of Human Resources	S:
On:	_

CONTRACT EMPLOYEES RESIGNING DURING SCHOOL YEAR

IMPORTANT: PLEASE READ CAREFULLY

Sanctions for Contract Abandonment: Contract employees are expected to abide by the terms and conditions of their employment contracts. When an employee fails to complete the contract, the District may recommend sanctions through the State Board of Educator Certification (SBEC). If sanctions are imposed by SBEC, the educator's Texas certification may be suspended a minimum of one calendar year. An employee may be released from his or her contract mid-year for good cause, as determined by the District.

Release from Contract: Below are acceptable reasons and documentation required to be considered for contract release. You must submit this mid-year resignation form along with supporting documentation at least five (5) days before the effective date of your resignation. If you do not submit documentation establishing good cause to abandon your contract, Human Resources will recommend the Board of Trustees pursue sanctions through SBEC.

Reason (including, but not	Required Supporting Documentation
limited to):	
Medical or Health	
Serious illness or health	Medical documentation from a treating physician
condition of the educator or the	attesting to the serious medical or health issue(s) for
educator's close family	self or the individual listed. Documentation should
member: Examples: spouse,	provide sufficient details for the district to make an
child, parent or grandparent	informed decision. Examples: diagnosis, impairment,
	physical or mental condition, or any regimen of
	continuing treatment
Relocation	
Due to promotion/job offer for	Family Member's official job offer letter noting the
spouse or partner who resides	business or organization's location, address, and
with the educator	contact information
Promotion	
Due to promotion for educator	Official job offer letter and job description for the
	position to be accepted. Resignations will not be
	accepted for lateral moves or increases in pay alone.
Change in Family Needs	
Due to a significant change in	Medical documentation from a treating physician
the family needs that requires	attesting to the medical or health issues(s) for the
the educator to relocate or	individual listed. Documentation should provide
devote more time than allowed	sufficient details for the district to make an informed
by current employment	decision.

CONTRACT RELEASE REQUEST FORM

Completion of this form indicates your voluntary resignation/retirement from BISD after the 45-day grace period Date: _____ First Name Middle Name Print Last Name Job Title: Campus/Department: I wish to offer my resignation/retirement from employment with Beaumont ISD effective______. (this is the last duty date) Reason for Resignation: Other Employment Retire from TRS Remain at Home Charge career fields Relocating from Beaumont area Other (Specify) TEACHERS AND CONTRACT EDUCATORS (Texas Education Code Section 21.105, 21.160, and 21.210 A teacher employed under a probationary contract for the following school year or a term contract, may relinquish the position and leave the employment of the district at the end of a school year without penalty by filing with the board of trustees or its designee a written resignation not later than the 45th day before the first day of instruction of the following school year. A written resignation mailed by prepaid certified or registered mail to the president of the board of trustees or board designee at the post office address of the district is considered filed at the time of mailing. A teacher employed under a probationary or term contract may resign, with the consent of the board of trustees or the board's designee, at any other time. On written complaint by the employing district, the State Board of Education Certification (SBEC) may impose sanctions against a teacher employed under a probationary or term contract who: (1) resigns; (2) fails without good cause to comply with subsection (a) or (b); and (3) fails to perform the contract. My signature below acknowledges I understand the following: ❖ I am requesting to be released from my current contract because of a resignation/retirement after the 45-day grace period in accordance with Texas Education Code Sections 21,105,21,160, and 21,210. ❖ I am submitting the request 45 days prior to my anticipated last day worked. If my resignation/retirement and supporting documentation are not submitted in a timely manner, I understand the District may not release me from my contract or may sanction my teaching certificate in accordance with Texas Education Code Sections 21.105,21.160, and 21.210. Employee Signature: Date: Principal/Supervisor Acknowledgment: ______ Date: _____

EXIT REPORT REPORTE FINAL

Name Nombre						
First Primer Nombre		Middle Inicial de Segur		Last Apellido		nployee No. . de Empleado
Job Title Posicion				ng Wage do Final		
Location of Work Departamento				s Worked as Trabajadas	Mo/day/yr.(mes/dia/a	
					From Desde	Through Hasta
Nature of Separation Razon Por Separacion		esignation enuncia	Retire Retire			eave of Absence ermiso
		ack of Work scasez de Trabajo	Discha Despid			her tro
Resson for separation (1 Motivo de Separacion: (npleado)			
(Attach additional infor	mation if no	ecessary)		(Si es ne	cesario, incluya infor	mation adicional)
	nt with the	District. (Estoy entera	do de mi derecho	para continuar	y/o camblar cualquie npleo con el Distrito.	nrough payroll deductions at r poliza de aseguranza en la cual
Signature of Employee/A Reason for Separation (' Motivo de Separacion: (To be comp	leted by Administrator			a	
(Attach additional inform	mation if ne	cessary)		(Si es nec	essario, incluya inform	macion adicional)
If separation was volunt Si la separacion fue volu			e?	Yes Si	No No	
If ye Si contesto Si	es, how muc , cuanto tier					
If employee was termina Si el empleado fue term Yes Si		ala conducta, ya habla No Date		interiormente?	_	
By whom? Por quien?			Expl _ Expl			
(Attach additional inform	mation if ne	cessary)		(Si es nece	esario, incluya informa	acion adicional)
Signature of Supervisor	or Administ	trator/Firma de Supen	visor/Administrat	or	Date/Fecha	

Exiting Employees To-Do List

Your Beaumont ISD user account will be disabled within 24 hours after your last day of employment in the District. This means you will not be able to access network drives, your Google account, and/or district applications including email, TEAMS, and Eduphoria. (NOTE: If you are teaching summer school, this won't happen until after summer school is completed.)

BEFORE YOUR ACCOUNT IS DISABLED, you need to save the resources and reports that you may want or need. This may include doing any of the following:

Gmail	Any emails you want to keep? Forward them to your personal	
	email account	
	Save your contacts	
Eduphoria	If you are moving to a district that uses Eduphoria, you can	
Professional	email <u>dshaff1@bmtisd.com</u> and ask for your professional	
Development Portfolio	development portfolio. Your new district can upload this export	
	file into their Eduphoria system.	
TEAMS	If you need a copy of previous W-2 forms or paycheck stubs,	
	they can be accessed from the Employee Service-Center link in	
	TEAMS on the district's website.	

Beaumont ISD Resources

HUMAN RESOURCES				
Brandon Basinger	HR Manager	409/617-5095		
_		bbasing@bmtisd.com		
Debbie Mason	HR Manager	409/617-5864		
		dmason@bmtisd.com		
Stephanie Booker	HR Specialist	409/617-5093		
		sbooke1@bmtisd.com		
Mona Richard	HR Specialist	409/617-5094		
		mrichar@bmtisd.com		
Mary Guest	Substitute Specialist	409/617-5098		
		mguest@bmtisd.com		
Kiani Lewis	Leave Specialist	409/617-5251		
		klewis2@bmtisd.com		
Jannai McClelland	Certification Specialist	409/617-5096		
		jmcclel@bmtisd.com		
Carolina Ramirez	Administrative Asst.	409/617-5298		
		cramire@bmtisd.com		
PAYROLL				
Estela Cardenas	Supervisor Payroll	409/617-5144		
		ecarden@bmtisd.com		
BENEFITS				
Kristi Whitten	Benefits Specialist	409/617-5129		
		kwhitte@bmtisd.com		