

TO: Retirees Separating from Prince William County Public Schools (PWCS)

FROM: Human Resources Department (HR) and Benefits and Compensation Department

SUBJECT: Exit Interview and Procedures for Separation and Conversion of Employee Benefits

You have received this package from PWCS HR because we were notified of your retirement. Please read this packet thoroughly and respond to those items which apply to you.

Please read the following carefully:

Direct Deposit

Your current direct deposit will remain in effect through your last regular paycheck. Pay statements will be emailed through the end of your work schedule. If you are still receiving pay after your work schedule stops, pay statements will be mailed to your address of record. It will be necessary to notify the Payroll Office of any change to your direct deposit account. Send an email to PWCSPayrollOffice@pwcs.edu for assistance and required form (found on the [PWCS](#) website).

Exit Survey

The Human Resources Department will be sending out an invitation to complete an Exit Survey. We would like for you to take a few moments to complete the survey. Your valuable feedback will help us in our efforts to make continuous improvements for our employees. If you would prefer an in-person exit survey meeting, please contact the Employee Relations Supervisor at 703-791-8767.

Change of Name/Address

If you are a current PWCS employee, change your name and/or phone number in the [Employee Self Service \(ESS\)](#) website which can be found in your PWCS bookmarks. You should notify PWCS immediately of any address change. The payroll system utilizes those records to print all statements, checks, and other required materials to be mailed to employees.

If you are a former PWCS employee and your email/login is no longer active, please call the Benefits and Compensation Department at 703-791-8568 for instructions regarding how to change your address and/or phone number.



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If you are retiring and have not filed your Virginia Retirement Services Application for Retirement please contact Kristin Brittigan at 703-791-8772 or brittika@pwcs.edu.



I.D. Badge Reminder

If you have not turned in your badge to the Risk Management and Security Department, place employee badge in an envelope and return to:

Prince William County Public Schools
Attention: Risk Management and Security
Department
P.O. Box 389
Manassas, VA 20108



Information Technology

30 days prior to leave date

Outlook

Create a Rule in Outlook with the contact information of the person that will be replacing the user in the current position. Add the leave date/effective date in the Rule as well. If this information isn't available add the name of the person that will be covering for the user. Do not remove the rule.

Office 365

OneDrive Files--if the user is listed as the owner and other users need access to files after the user leaves the file(s) will need to be saved locally and sent to them via email or given to them via flash drive so they can upload the file(s) into their own OneDrive or into an Office 365 group.

If the user has numerous OneDrive files that need to be saved an easy way to move them is to create a Microsoft Team for the files. Go to Office 365, click on the waffle, click on the OneDrive tile. Click on my files, right click the folder and/or file and click on move to team. On the left-hand side click on the team that you created. You can save the files to a channel in the team or to the site library. Invite users to the team that will need access to the files. Communicate that the folders/files are available in the file's directory in XXXX Team.

Remember: Sharing is not enough. Once the user account is disabled the file(s) are no longer accessible.

Shared Calendars--Microsoft does not support shared calendars. Create an Office 365 group so all information from the shared calendar can be moved to the group calendar. On the Office 365 group assign an owner in addition to yourself and any additional user permissions.



On leave day

Human resources will change the status of the user account from active to inactive. ITS will disable the network and logon account within 24 hours of the change from human resources. The network and all Office 365 data will be inaccessible.

Office 365-The account will be disabled when the network logon is disabled. All information in the Office 365 account will be inaccessible after 30 days but the logon will remain in the system for 365 days in case the user returns to Retirement Opportunity Program.

Mailbox- The mailbox will be disabled and not accessible once the account is disabled. Make sure the rule mentioned above has been created and is turned on.

Student Information Systems—Student Management System (SMS), Gradebook, Parent Portal—The SMS Admin at your building location will submit the ticket to inactivate the account. The SMS Admin will also verify that the staff member is no longer assigned to any classes in SMS before entering the ticket. Once the SMS account has been deactivated the user will not be able to log into SMS, Gradebook or Parent Portal.

Data Analysis and Reporting Tool (DART)-Access is controlled by HR status. When the user is set to Inactive in HR the DART access will be terminated.

EdPlan-Access is controlled by the network logon and will disable when the network logon is disabled.

Employee Self Service -Access is controlled by human resource status. When the user is set to inactive in human resources the Employee Self Service access will be terminated.

All other applications associated with your Office 365 account will be inaccessible once the account is marked disabled.



If returning to Retirement Opportunity Program (ROP)

Human Resources will add the Retirement Opportunity Program date into the Human Resource system. On the date the user is to return to Retirement Opportunity Program the original network ID and Office 365 account will be activated.

Data Analysis and Reporting Tool and EdPlan access will activate automatically.

If additional access is needed for Student Management System, Gradebook and Parent Portal the user will need to open a ticket with the Help Desk.



Insurances and other PWCS Benefits

If you separate employment with PWCS during the plan year, your right to various benefits will be determined in the following manner:

Dependent Care Flex Benefit

After your separation, your participation will cease, and no further salary contributions will be contributed to your account. You will still be able to request reimbursement for qualifying dependent care expenses for the remainder of the plan year from the balance remaining in your dependent care account at the time of your separation of employment.

Health Care Flex Benefit

Your participation will cease after your separation and no further salary contributions will be made to your account. You will be able to submit claims for reimbursement of health care expenses incurred prior to your date of separation.

Insurance(s)

You will remain covered by insurance, but only for the period for which premiums have been paid. This includes:

- Anthem BC/BS
- Kaiser Permanente
- Delta Dental High Option
- Delta Dental Standard Option
- Vision Service Plan (VSP)
- Standard Long-Term Disability

Retiree Health:

You may be eligible to enroll in retiree health. Please contact Kristin Brittigan at brittika@pwcs.edu to discuss your eligibility and options.



Guidance Regarding Continuing Group Health Insurance Coverage Through COBRA

Federal law requires that most group health plans (including this Plan) give employees and their families the opportunity to continue their health care coverage through COBRA continuation coverage when there is a “qualifying event” that would result in a loss of coverage under an employer’s plan, such as the end of employment. The PWCS COBRA continuation coverage is administered by P&A Group. **You will receive formal written notification of your COBRA election rights directly from P&A Group** at the address that PWCS has on file for you. To protect your and your family’s rights, keep PWCS informed of any changes in your address that would impact your receipt of your formal COBRA election notice from P&A Group.

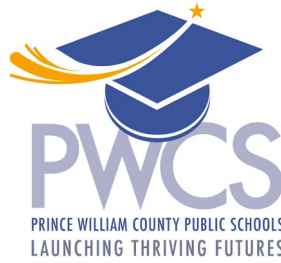
What is COBRA continuation coverage? COBRA continuation coverage is the same coverage that the Plan gives to other employee participants or beneficiaries who are not getting continuation coverage. Each “qualified beneficiary” who elects COBRA continuation coverage will have the same rights under the Plan as other participants or beneficiaries covered under the Plan.

If I elect COBRA continuation coverage, when will my coverage begin and how long will the coverage last? If elected, COBRA continuation coverage will begin immediately following the last day of active employee coverage. For example; final payroll deducted premium payment is made August 31, active employee coverage will end on September 30 (one month after final premium payment), COBRA continuation coverage (if elected) would begin October 1.

COBRA continuation coverage may last up to 18 months when an employee is discharged (except for gross misconduct) or leaves work voluntarily for any reason. Continuation coverage may end earlier than 18 months in certain circumstances, like failure to pay premiums, fraud, or the individual becomes covered under another group health plan.

If you elect continuation coverage, you may be able to extend the length of continuation coverage if a qualified beneficiary is disabled, or if a second qualifying event occurs.

How much does COBRA continuation coverage cost? COBRA continuation coverage will cost 102% of the PWCS group rate. Specific premiums will be detailed in the formal written notification of your COBRA continuation election rights from P&A Group.



Guidance Regarding Continuing Group Health Insurance Coverage Through COBRA (continued)

Are there other coverage options besides COBRA Continuation Coverage? Instead of enrolling in COBRA continuation coverage, there may be other more affordable coverage options available through the Health Insurance Marketplace (www.HealthCare.gov), Medicaid, Medicare, or other group health plan coverage options (such as a spouse's plan) through what is called a "special enrollment period." Some of these options may cost less than COBRA continuation coverage.

For more information: This notice does not fully describe continuation coverage or other rights under the Plan.

If you have questions about this information, your rights to coverage, or if you want a copy of your summary plan description, contact P&A Group (716-852-2611 or www.padmin.com).



Consider Your Options for Sick and Annual Leave at Separation

When you leave PWCS, you have the option to take the value of your sick and/or annual leave as follows:

1. A payment directly to you,
2. A deferred payment to your 403(b) and/or 457 accounts with Lincoln Financial Group,
3. A conversion to Health Insurance (for qualified retirees only),
4. A combination of previous options.

Medicare and Social Security taxes (combined rate 7.65%) must be paid by you via PWCS payroll for any option you select. If you select to have the funds paid directly to you, state and federal income taxes will also be deducted. If the funds are deferred to your retirement account, income taxes will be deferred until such time as you withdraw the funds. Retirees will pay their own income taxes from their final pay if they convert their sick leave to health insurance benefits.

If you select the retirement account option, be sure to check your annual maximum limit in your 403(b) plan. (For calendar year 2023, this limit is \$22,500 or \$30,000 if you are over 50.) If you have reached that limit or will reach it with this deferred payment, you will need to set up a 457(b) account to receive the funds in excess of your 403(b) limits. Please note: **The new 457(b) account must be set up no later than the month prior to your last month of employment.** If you have any questions or need assistance, please contact your assigned Lincoln Representative.

If you have any questions or need assistance, please contact your assigned Lincoln Representative. If you do not know who your Lincoln Representative is, you may find the school assignments listed online at LincolnFinancial.com/PWCS. Click on the CONTACT US tab.

- | | | |
|---------------------|--|--------------|
| • Carolyn Robinson: | Carolyn.Robinson@lfg.com | 717-585-5356 |
| • Steve Singer: | Steve.Singer@lfg.com | 703-680-4524 |
| • Liliana Zarate | Liliana.Zarate@lfg.com | 202-329-5715 |
| • Garrett Beckstrom | Garrett.Beckstrom@lfg.com | 571-501-6202 |
| • Spencer Richards | Spencer.Richards@lfg.com | 202-669-0102 |



Disposition of Accumulated Sick Leave (Return this form to Benefits@PWCS.edu)

Employee Name: _____ Employee ID Number: _____

Home Address: _____

Street Address

City

State

Zip Code

Phone Number

Employee Type: Classified Teacher Administrative

Type of Separation: Resign Retire Last date of work: _____

Eligible **employees retiring** from the Prince William County School System must select an option within sixty (60) days of separation or all rights to accrued, unused sick leave will be **relinquished**. Sick leave will be prorated for final pay purposes and any sick leave days (as represented in hours and minutes) used in excess for those hours earned shall be deducted from the employee's final paycheck. Eligible employees may be compensated for accrued, unused, sick leave at **10%** of their daily rate of pay at the time of separation within the limitations of **School Board** and **federal regulations**.

1. Pay _____ % directly to me for sick leave accumulated in Prince William County Public Schools.
2. Deposit _____ % of my accumulated sick leave into Lincoln Financial 403b Account. *
3. Deposit _____ % of my accumulated sick leave into Lincoln Financial 457 Account. *
4. Hold _____ days of sick leave from my rollover for use in the last 45 days of employment.

***Only when initiating a Lincoln transaction, receipt of this form is required 45 days prior to your last day of employment. Your sick leave will be removed at that time. Leave Without Pay will be applied to any future sick leave requested. Social Security taxes of 7.65% will be taken out of final payroll vouchers. You must meet with a Lincoln Representative prior to completing this form for their verification of this transaction.**

Employee Signature: _____ Date: _____

Lincoln Representative (if applicable) _____ Date: _____
Signature

Office use only

Daily Rate \$ _____ X Eligible Days _____ = Total Amt Due \$ _____

Date of Disbursement: _____ Date of Transfer: _____ # Days _____

Processed by: _____ Date: _____

Approval of Administrative Benefits Representative: _____ Date: _____



Disposition of Accumulated Annual Leave (Return this form to Benefits@PWCS.edu)

Employee Name: _____ Employee ID Number: _____

Home Address: _____

Street Address

City

State

Zip Code

Phone Number

Employee Type: Classified Teacher Administrative

Type of Separation: Resign Retire Last date of work: _____

Eligible **employees retiring** from Prince William County School System must select an option within sixty (60) days of separation or all rights to accrued, unused annual leave will be **relinquished**. Annual leave will be prorated for final pay purposes and any annual leave days (as represented in hours and minutes) used in excess of those hours earned shall be deducted from the employee's final paycheck. Eligible employees may be compensated for accrued, unused, leave at their per diem rate of pay at the time of separation within the limitations of **School Board** and **federal regulations**.

1. Pay _____ % directly to me for annual leave accumulated in Prince William County Public Schools.
2. Deposit _____ % of my accumulated annual leave into Lincoln Financial 403b Account. *
3. Deposit _____ % of my accumulated annual leave into Lincoln Financial 457 Account. *
4. Hold _____ days of annual leave from my rollover for use in the last 45 days of employment.

***Only when initiating a Lincoln transaction, receipt of this form is required 45 days prior to your last day of employment. Your annual leave will be removed at that time. Leave Without Pay will be applied to any future annual leave requested. Social Security taxes of 7.65% will be taken out of your final payroll vouchers. You must meet with a Lincoln Representative prior to completing this form for their verification of this transaction.**

Employee Signature: _____ Date: _____

Lincoln Representative (if applicable) _____ Date: _____
Signature

Office use only

Daily Rate \$ _____ X Eligible Days _____ = Total Amt Due \$ _____

Date of Disbursement: _____ Date of Transfer: _____ # Days _____

Processed by: _____ Date: _____

Approval of Administrative Benefits Representative: _____ Date: _____



Supplemental Retirement Plan 403(b)/457

Employees who separated employment with PWCS and participated in a Supplemental Retirement Plan have the following options regarding the funds in their Supplemental Retirement Account(s).

- **Participants who have an account balance over \$5,000 may:**
 - Leave the funds in existing account(s). Employees may decide, at a later date, to take a distribution or rollover.
 - Rollover the funds to a similar plan.
 - Cash out the funds (taxes and fees may apply).

- **Participants with an account balance between \$1,000 and \$5,000 may:**
 - Request a cash distribution within 90 days (taxes and fees may apply).
 - Rollover funds to a similar plan within 90 days.
 - Those who do not request a distribution/rollover within 90 days will automatically have their funds rolled over into a Lincoln IRA. This IRA will earn 3.75% interest the first year, and 3.6% for all remaining years. A \$30 annual fee is assessed on a quarterly basis (\$7.50 per quarter).*

- **Participants who have an account balance less than \$1,000 may:**
 - Request a cash distribution within 90 days (taxes and fees may apply).
 - Rollover the funds to a similar plan within 90 days.
 - Those who do not request a distribution/rollover within 90 days will automatically have their funds dispersed to them. The employee will be responsible for taxes and any applicable fees. *

* Lincoln reserves the right to process force-outs any time after the 90-day period has been satisfied.

Employees are always 100% vested. Employee and employer matching contributions may be withdrawn or rolled over following the date of separation. You may contact Lincoln Financial at the number below or via web at www.LincolnFinancial.com to request balance information and appropriate up-to-date forms.

Employees who would like to exercise an option are encouraged to contact the applicable company representative(s):

Lincoln Alliance	1-800-234-3500
AIG/Valic	1-800-448-2542
Great-West	1-800-701-8255
ING (Aetna)	1-800-525-4225
Lincoln Life	1-800-454-6265

Any additional questions may be forwarded to the Benefits and Compensation Department at 703-791-8568, or via email benefits@pwcs.edu.