



TO: Retirees Separating from Prince William County Schools

FROM: Department of Human Resources

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

You have received this package from the Prince William County Schools Department of Human Resources 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 Office of Payroll of any change to your direct deposit account. Send an email to PWCSPayrollOffice@pwcs.edu for assistance and required form (found on the pwcs.edu web page).

Exit Survey:

The Department of Human Resources 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 Office of Employee Relations at the following number: 703.791.8767.

Change of Name/Address:

If you will be changing your address you will need to complete the Change of Name/Address Form to PWCS as soon as possible. Correspondence from PWCS is **NOT FORWARDED** by the US Postal Service. If you do not change your address with the PWCS Department of Human Resources you will not receive your W-2, COBRA continuation letter, 1095-C form, or any other important correspondence from PWCS following your employment separation.

Contact Information:

If you have any questions regarding any of the forms or information contained in this packet, please see the following page for contact information.



Summary of Contents

Form/Information	Page	Department Contact	Phone Number
Change of Address	3	Compensation Office	
• <i>Teachers & Administrators</i>			703.791.8050
• <i>Classified</i>			703.791.8050
I.D. Badge Reminder	4	Risk Mgmt. & Security	703.791.8911
Information Technology	6	Help Desk	703.791.8826
Leaves		Time and Leave Office	703.791.8050
• Payout Options	7		
• Sick	8		
• Annual	9		
Retirement		Office of Benefits	
• Supplemental Retirement	10		703.791.8050

If you are retiring and have not filed your Virginia Retirement Services Application for Retirement please contact Kristin Brittigan @ 703.791.8772 or brittika@pwcs.edu.



CHANGE OF NAME AND/OR ADDRESS FORM

Please type or print the information

CHECK ONE: Classified Teacher/Admin

NAME: _____

SOCIAL SECURITY # _____

WORK LOCATION: _____

NAME CHANGE: *Please note, to process a name change, additional documentation such as a copy of a Marriage Certificate or court document must be provided.*

FROM: _____
Last First Middle

TO: _____
Last First Middle

CHANGE OF ADDRESS:

FROM: _____
Street Address

City State Zip Code

TO: _____
Street Address

City State Zip Code

CHANGE OF PHONE NUMBER:

FROM: _____
Area Code Phone Number

TO: _____
Area Code Phone Number

EFFECTIVE DATE OF CHANGE(S) LISTED ABOVE: _____

SIGNATURE: _____ DATE: _____

Submit change requests to the PWCS Department of Human Resources by:
Fax: 703.791.8193, Courier, or Mail to: PWCS Attn: DHR, P.O. Box 389, Manassas, VA 20108



I.D. Badge Reminder

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

Prince William County Public Schools
Attention: Benefits
P.O. Box 389
Manassas, VA 20108



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

Shared Calendars--MS 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

HR 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 HR. 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 ROP.

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.

SIS--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.

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.



ESS-Access is controlled by HR status. When the user is set to Inactive in HR the ESS access will be terminated.

If Returning to ROP

HR will add the ROP date into the HR system. On the date the user is to return to ROP the original network ID and Office 365 account will be activated.

Dart and EdPlan access will activate automatically.

If additional access is needed to SMS, Gradebook and Parent Portal the user will need to open a ticket with the SIS Help Desk.



Consider Your Options for Sick and Annual Leave at Separation

When you leave Prince William County Schools (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 a qualify 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 CY 2018, this limit is \$18,500 or \$24,500 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.

- | | | |
|----------------------|--|--------------|
| • Haleh Nikmaram: | Haleh.Nikmaram@lfg.com | 703-581-9535 |
| • Kathleen Fox: | Kathleen.Fox@lfg.com | 703-730-5151 |
| • Michael Knapp: | Michael.Knapp@lfg.com | 571-438-1705 |
| • Ernest Massenberg: | Ernest.MassenbergIII@lfg.com | 703-437-7793 |
| • Steve Singer: | Steve.Singer@lfg.com | 703-680-4524 |
| • Liliana Zarate | Liliana.Zarate@lfg.com | 202-329-5715 |



Disposition of Accumulated Sick Leave
(Return this form to the Time and Leave Office)

(Please Print)

Employee Name: _____ Employee No: _____

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** employment 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 pay check. 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. Receive _____ % paid 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.

***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.**

Lincoln Representative _____ Date: _____

Signature: _____ Date: _____
 Employee

Signature: _____ Date: _____
 Approval of School Board Representative

Office use only

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

Processed by: _____ Date: _____



Disposition of Accumulated Annual Leave
(Return this form to the Time and Leave Office)

(Please Print)

Employee Name: _____ Employee No: _____

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** employment from the Prince William County School System shall be paid for the unused portion of their annual leave at their per diem rate at the time of separation. 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 pay check. Eligible employees may be compensated for accrued, unused, leave at their hourly rate of pay at the time of separation within the limitations of **School Board** and **federal regulations**.

1. Receive _____ % paid 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.

***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 final payroll voucher. You must meet with a Lincoln Representative prior to completing this form for their verification of this transaction.**

Lincoln Representative _____ Date: _____

Signature: _____ Date: _____
 Employee

Signature: _____ Date: _____
 Approval of School Board Representative

Office use only

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

Processed by: _____ Date: _____



Supplemental Retirement Plan 403(b)/457

Employees who separated employment with Prince William County Schools (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	800.234.3500
AIG/Valic	800.448.2542
Great-West	800.701.8255
ING (Aetna)	800.525.4225
Lincoln Life	800.454.6265

Any additional questions may be forwarded to the Office of Benefits at 703.791.8050, or via email benefits@pwcs.edu.