

TO: All Employees 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 because we were notified of your separation. 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 by 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).

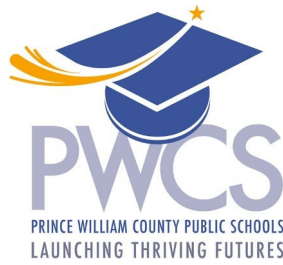
Exit Survey

The Human Resources Department will be sending out an invitation to complete an Exit Survey. We would like 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If you are a former PWCS employee and your email/login is no longer active, please call the Benefits and Compensation Department at 703-791-8568 for instructions regarding how to change your address and/or phone number.



Security and Crisis Readiness

Returning your I.D. Badge

If you have not turned in your badge to Security and Crisis Readiness, be sure to place your employee badge in an envelope and return to:

Prince William County Public Schools
Attention: Security and Crisis Readiness
P.O. Box 389
Manassas, VA 20108



Information Technology

30 Days Prior to Your Last Day of Work

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.

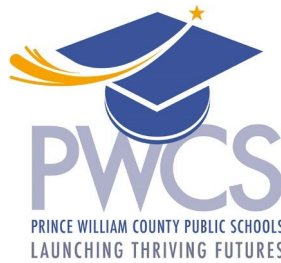
Office 365

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.



Last Day of Work

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 log-on will remain in the system for 365 days in case the user returns to the 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.

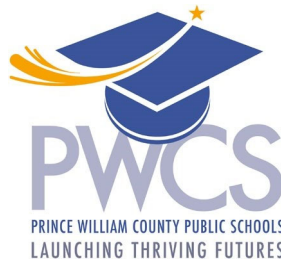
Student Information Systems—Student Management System (SMS), Gradebook, Parent Portal— The SMS Admin at your building location will submit the ticket to inactivate the account. The SMS Admin will also verify that the staff member is no longer assigned to any classes in SMS before entering the ticket. 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 be 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.



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 and Health Care Flex Benefit

After your separation, your participation will cease, and no further salary contributions will be contributed to your account. There are limits to your reimbursement after your employment ends. Please call the plan administrator for more information.

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



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 on 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.

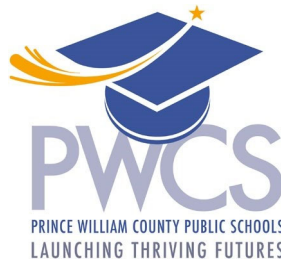
If you have questions about this information, your rights to coverage, or if you want a copy of your summary plan description, contact P&A Group (716-852-2611 or www.padmin.com).

Important Life Insurance Information

How to keep your life insurance going.....

You may continue your life insurance protection that has been provided to you as a PWCS employee by taking out an individual life insurance policy. This is called a conversion, and your right to do so is called a conversion privilege. To exercise your conversion privilege, you must - **within 31 days after your group insurance ends** - submit the completed conversion enrollment form and the first premium payment to Securian. The conversion packet is located at varetire.org, click on **Forms**, click on **Securian Financial/VRS Life Insurance Forms**, select **Conversion Brochure**, or to go directly to the forms by using this address <https://web1.lifebenefits.com/content/lifebenefits/vrs/en.html> .

For more information about your conversion privilege, contact Securian at: 1-800-441-2258.



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 transfer of sick leave to another school division
2. Payment directly to you
3. A deferred payment to your 403(b) and/or 457 accounts with Lincoln Financial Group
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 except transfers. 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 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 2025, this limit is \$23,500 or \$31,000 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) 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. Please note that this form does require a signature by a 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.

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|---------------------|--|--------------|
| • 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 |



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

Employee Name: _____

Employee ID Number: _____

Home Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____

Employee Type: ☐ Classified ☐ Teacher ☐ Administrative

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

Eligible employees leaving PWCS must choose an option within 60 days or forfeit unused sick leave. Sick leave will be prorated for final pay, and any excess usage will be deducted. Compensation for unused sick leave is 10% of the daily pay rate, subject to School Board and federal rules.

1. Pay _____ % directly to me for sick leave accumulated in PWCS
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. Transfer _____ hours of accumulated sick leave to another school division.
Name of transfer school/district: _____
Address: _____

*** For a Lincoln transaction, submit this form 45 days before your last workday. Sick leave will be removed, and future sick leave will require Leave Without Pay. Final payroll vouchers will have 7.65% Social Security tax deducted. Meet with a Lincoln Representative beforehand to verify the transaction.**

Employee Signature: _____ Date: _____

Lincoln Representative (if applicable) _____ Date: _____

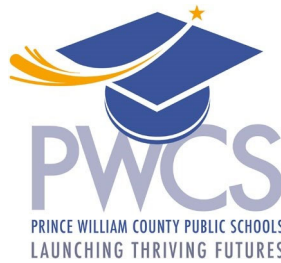
Office use only

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: _____
City: _____ State: _____ Zip Code: _____
Phone Number: _____

Employee Type: ☐ Classified ☐ Teacher ☐ Administrative

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

Eligible employees leaving PWCS must choose an option within 60 days or forfeit unused sick leave. Sick leave will be prorated for final pay, and any excess usage will be deducted. Compensation for unused sick leave is 10% of the daily pay rate, subject to School Board and federal rules.

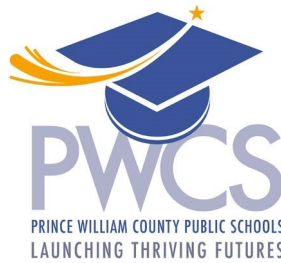
1. Pay _____ % directly to me for annual leave accumulated in PWCS
2. Deposit _____ % of my accumulated annual leave into Lincoln Financial 403b Account. *
3. Deposit _____ % of my accumulated annual leave into Lincoln Financial 457 Account. *

*** For a Lincoln transaction, submit this form 45 days before your last workday. Sick leave will be removed, and future sick leave will require Leave Without Pay. Final payroll vouchers will have 7.65% Social Security tax deducted. Meet with a Lincoln Representative beforehand to verify the transaction.**

Employee Signature: _____ Date: _____

Lincoln Representative (if applicable) _____ Date: _____

Office use only	
Daily Rate \$ _____	X Eligible Days _____ = Total Amt Due \$ _____
Date of Disbursement: _____	
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 in 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 from them. The employee will be responsible for taxes and any applicable fees. *

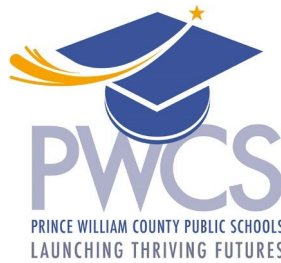
* Lincoln reserves the right to process force-outs any time after the 90-day period has been satisfied.

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
Corebridge	1-800-448-2542
Empower	1-800-701-8255
Voya	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.



Virginia Retirement System (VRS) Refunds

Virginia Retirement System (VRS) members fall into one of three plans: Plan 1, Plan 2, or the Hybrid Plan. Members hired before July 1, 2008, are in **Plan 1**. Those hired between July 1, 2008, and January 1, 2014 (and not vested by January 1, 2014), are in **Plan 2**. Employees hired on or after January 1, 2014, without prior VRS service are enrolled in the Hybrid Plan.

For refunds:

- **Not vested (less than 5 years of service):** Receive your contributions and interest; employer-paid contributions and interest are forfeited.
- **Vested (5+ years of service) or involuntarily separated:** Receive a full refund, including employer-paid contributions and interest.

Taking a refund cancels your VRS membership and future eligibility for benefits. If you return to covered employment after a refund, you will be rehired under the current plan and can repurchase your refunded service. Alternatively, you can leave your account balance with VRS and become a deferred member.

Refund Application

The Defined Benefit Plan Request for Refund for all the plans is done online through VRS. Visit www.varetire.org and log in to request a refund. If you have not created an online account, you will need to create one at this time to request a refund.

HYBRID PLAN EMPLOYEES PLEASE NOTE: The Hybrid Plan includes a Defined Benefit and a Defined Contribution. To request a distribution from your Defined Contribution, submit the appropriate form to Voya by mail or fax. Forms can be found at www.varetire.org under the "Defined Contribution Plans" tab. Separate forms are needed for the Hybrid 457 Deferred Compensation Plan and the Hybrid 401(a) Cash Match Plan. For assistance, contact Voya at 1-877-327-5261.

Look up Your Member Information in myVRS

View your account balance, retirement eligibility dates, estimated benefits, and more through your member record. This information can guide you if you're considering leaving employment. Create a secure online account at www.varetire.org/myVRS/. For help, contact the Benefits and Compensation Department at 703-791-8772 or VRS toll-free at 1-888-VARETIR (1-888-827-3847).