



# **Burkburnett ISD**

## **Exiting Employee Information Guide**

## TABLE OF CONTENTS

| TOPIC  | PAGE |
|--|------|
| Introduction                                       | 3    |
| Your Responsibilities                              | 4    |
| What Happens with My Final Pay and Leave Balances? | 5    |
| What Happens to My Benefits?                       | 6    |
| Teacher Retirement System of Texas                 | 8    |
| Separation Checklist                               | 9    |
| Sample Resignation Letter                          | 10   |
| Records Request Form                               | 11   |
| BISD Contact List                                  | 12   |

## **EXITING EMPLOYEE INFORMATION GUIDE**

---

This Exiting Employee Information Guide has been assembled to assist you as you conclude your employment in Burkburnett 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 Burkburnett ISD under the Educators' Code of Ethics located in Policy DH. As you know, your employment with Burkburnett 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.

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.

Burkburnett Independent School District appreciates your contribution to students and wishes you future success in all your endeavors!

Leah Tunnell  
Assistant Superintendent for Administrative Services  
940.569.3326  
[leah.tunnell@burkburnettisd.org](mailto:leah.tunnell@burkburnettisd.org)

## 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 if you are retiring through TRS. The following should be included on your Letter of Resignation:

- Date you write the letter
- Your last day of work
- Your signature
- Permanent email address

*Please see the sample resignation letter on page 10. It can also be found on the HR page of the website.*

### 📌 Return District Property

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

- Parking permit, identification badge
- All keys, including keycards and fobs
- 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

### 📌 Exit Interview Survey

Please go to the following link to complete the exit interview survey: [https://docs.google.com/forms/d/1s9W1MnV2bje\\_ZkKs7jrfMiYk9UVBZ-WiucVsYoRdf9k/edit?usp=sharing\\_eil&ts=60638a7c](https://docs.google.com/forms/d/1s9W1MnV2bje_ZkKs7jrfMiYk9UVBZ-WiucVsYoRdf9k/edit?usp=sharing_eil&ts=60638a7c)

### 📌 Elect Cobra Continuation Coverage if you need to extend your benefits coverage

Employees have sixty (60) days after benefits expire to elect Cobra Continuation Coverage. You will receive two packets in the mail from BISD's third-party insurance COBRA Administrators.

- **Dental & Vision** USEBSG 972-772-0900
- **Medical – TRS ActiveCare** Bswift 1-833-682-8972

### 📌 Request Service Records

To request your Service Records, use the form on page 11. It can also be found on the HR page of the website.

Email completed form to [shana.kau@burkburnettisd.org](mailto:shana.kau@burkburnettisd.org)

A copy of the BISD service record will be emailed to you for signature, verifying the information is correct. Once the signed copy is returned to BISD, all originals will be mailed to the address on the request form.

**Note:** *The experience column on the service record is based on the beginning of each school year.*

### 📌 Employee Access Center

Employee Access can be accessed from Skyward Financial located on the District website at [www.burkburnettisd.org](http://www.burkburnettisd.org) using your log in information. Employee Access will be active for 15 days after your termination date and 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
- Demographic Data – Update your address, phone number or contact information online

## **WHAT HAPPENS WITH MY FINAL PAY?**

---

### **FINAL PAY**

After an employee's departure from BISD, they can expect final paycheck on the payroll date following their last day worked. Please note that there can be exceptions to this rule, and we will make every effort to make the final payment promptly.

If an employee completes their assignment or contract, then pay will run through the last payroll date of their assignment or contract; depending on the length of the assignment or contract.

When an employee who has used more leave than he or she has accumulated ceases to be employed by the District, the cost of the unearned leave days shall be deducted from the employee's final paycheck.

The final check will be Direct Deposited. The only exception is if the Business Office is asked to hold the check for personal pick up pending return of district property.

## **WHAT HAPPENS TO MY LEAVE BALANCES?**

---

### **PAYMENT OF LEAVE AT RETIREMENT**

An employee who takes retirement with the Texas Teacher Retirement System (TRS) with a combination of age and service years equal to 80 or more shall be compensated for accumulated local sick leave accrued while employed by the District at a rate to be determined by the Board of Trustees. A retiring employee may be compensated for no more than 50 local days.

### **REMAINING LEAVE AT RESIGNATION**

Any state leave accumulated prior to resignation will appear on your service record and will be honored at any Texas public school district. Local leave remains with the district and will be made available for use if you return to the district.

## **WHAT HAPPENS TO MY BENEFITS?**

---

### **Employees Who Terminate Prior to the End of Their Contract**

If an employee terminates employment with the District before completing the number of work days assigned to their contract, the insurance and benefits will end at midnight on the last day of the calendar month in which the termination is effective.

### **Employees Who Terminate On or After Last Day of Their Contract**

For those employees that have terminated employment on or after the last day of their contract, the District will terminate the benefits on August 31 of that calendar year.

- **Medical - COBRA Continuation Coverage**

An employee may choose to keep their current benefit coverage longer by enrolling in a COBRA (Consolidated Omnibus Budget Reconciliation Act of 1985). Under COBRA, the employee and all dependents that were covered on the TRS ActiveCare Medical plan, while actively at work, may continue that same coverage for up to 18 months if elected. Once the employee's termination has been processed in our system, an election packet will be sent from BCBS-Bswift for the COBRA coverage. The cost is 102% of the premium, which is the full premium rate plus a 2% administrative fee. The employee will remit their premiums directly to the COBRA administrator.

- **Dental & Vision – COBRA Continuation Coverage**

Employees can also elect to have COBRA coverage for their Dental and Vision. Once the employee's termination has been processed in our system an election packet will be sent to them from US Employee Benefits Service Group for the Dental and Vision COBRA coverage. The cost is also 102% of the total premium, which is the full premium rate plus a 2% administrative fee. The employee will remit their premiums directly to NavigateHCR Dental and Vision COBRA coverage.

Employees have a 60-day election period from the termination date to make decisions on COBRA continuation coverage. They will receive two packets in the mail from the District's COBRA Administrators.

Medical - TRS ActiveCare - Bswift 1-833-682-8972

Dental & Vision - USEBSG 972-772-0900

- **Flexible Spending Accounts (FSA) and Dependent Care Spending Account (DCSA)**

The use of the Flex Account and Dependent Care Account will continue through the employee's benefits termination date. If an employee has any unused balances in a Medical FSA account and/or Dependent Care account, the employee can be reimbursed for eligible expenses incurred prior to the termination date. Higginbotham 866-419-3519

- **Health Savings Accounts (HSA)**

If an employee has a balance in an HSA those funds will not be lost. The existing HSA card will be closed and a new debit card will be sent to the employee in order to use the funds in the HSA for eligible medical expenses. EECU 800-333-9934

- **Portable Benefits**

If an employee is wanting to continue any other benefits, you can contact the provider directly to set up continuation of coverage. Below is a list of our current benefits and contact details for portable-eligible benefits:

|                   |                             |              |                  |
|-------------------|-----------------------------|--------------|------------------|
| Permanent Life    | Lincoln Financial           | 800-423-2765 | www.lfg.com      |
| Critical Illness  | Cigna                       | 800-754-3207 | www.cigna.com    |
| Accident          | Cigna                       | 800-754-3207 | www.cigna.com    |
| Identity Theft    | LifeLock                    | 844-698-864  | www.lifelock.com |
| Accidental D&D    | Lincoln Financial           | 800-423-2765 | www.lfg.com      |
| Medical Transport | Medical Transport Solutions | 800-423-3226 | www.masamts.com  |

- **403(b) Account**

The money employees contribute to a 403(b) retirement account is always their money, regardless of how long they have worked for BISD. There are several things that an employee can do with a 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 it over 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

You can contact The Omni Group if you have any questions about your 403 (b) accounts.

1-877-544-6664

Website: [www.omni403b.com](http://www.omni403b.com)

- **457 Account**

The money an employee contributes to a 457 retirement account is always the employee's, regardless of how long you have worked for BISD. There are several things that an employee can do with a 457 account after leaving the district.

- Transfer the vested account balance to another tax-advantaged 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 1/2)

You can contact TCG Administrators if you have questions about your 457 accounts.

1-877-544-6664

Website: [www.omni403b.com](http://www.omni403b.com)

## **TEACHER RETIREMENT SYSTEM OF TEXAS**

---

### **IF YOU ARE PLANNING TO RETIRE:**

If you are planning to retire, you should 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 have questions regarding retirement, please contact TRS at 800-223-8778**

### **IF YOU ARE LEAVING EMPLOYMENT BUT NOT RETIRING:**

If you are leaving employment but aren't retiring, you have three options:

- Leave your contributions in your plan.
  - ▶ If you have less than five years of TRS service credit, 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 employer. The interest rate is currently two percent.
  - ▶ If you have at least five years of TRS service credit you may leave your accumulated contributions with TRS and earn interest as long as these funds remain with TRS. The interest rate is currently two percent. When you meet 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.

If you wish to withdraw your Teacher's Retirement, you can call 1-800-223-8778, or go online to [www.trs.texas.gov](http://www.trs.texas.gov) to obtain the forms. The above information is as accurate as the district can determine. TRS Updates regulations quite frequently and TRS always has the most up to date information.

### **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 Retirees and Beneficiaries section at [www.trs.texas.gov](http://www.trs.texas.gov)



## Burkburnett Independent School District Separation Check List

☐ Resignation/Retirement letter turned in to Human Resources: [leah.tunnell@burkburnettisd.org](mailto:leah.tunnell@burkburnettisd.org)

☐ Sample resignation letter-see next page

☐ If retiring, turn in *current* TRS statement of member account and Retirement/Resignation letter to HR. Turn in TRS 7 turned in to Christy Steigerwald, Payroll Coordinator  
[christy.steigerwald@burkburnettisd.org](mailto:christy.steigerwald@burkburnettisd.org)

☐ Records request completed: Email to: [shana.kau@burkburnettisd.org](mailto:shana.kau@burkburnettisd.org)

☐ Permanent address and email address provided via BISD Exit Survey (see link below) BISD Exit Survey completed:  
<https://f.hubspotusercontent10.net/hubfs/2970667/BISD/BISD%20Docs/Employment%20Forms/Exit%20Interview%20for%20Principals%20pdf.pdf>

☐ Contact Benefits office if necessary: [shana.kau@burkburnettisd.org](mailto:shana.kau@burkburnettisd.org)

☐ Notified of my right to continuation of health insurance under COBRA

☐ Keys returned to campus contact

☐ Access fob returned to campus contact

☐ All technology equipment turned in to campus contact

☐ Office/classroom/workspace clear of personal items by agreed upon date

☐ Uniforms and other district property returned to supervisor/designee

**Please Note:** *In most cases, employee email, Skyward Student and all other technology access will be deactivated immediately following your last work day.*

## SAMPLE RESIGNATION LETTER

Date: \_\_\_\_\_

To: Campus Principal/Supervisor Name here

{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.}

Sincerely,

Your Signature

Your Name

At the bottom of the letter, you must include:

Permanent Address: \_\_\_\_\_

Permanent Phone Number: \_\_\_\_\_

Personal Email Address: \_\_\_\_\_



Burkburnett ISD  
Employee Records Request

## EMPLOYEE INFORMATION

NAME:

BIRTHDATE:

ALTERNATE NAMES USED:

PERSONAL EMAIL:

PHONE:

POSITION HELD:

YEARS WORKED:

## RECORDS REQUESTED

### Current Employees:

\*Certifications may be retrieved from the official web site ( [www.tea.texas.gov](http://www.tea.texas.gov)) using your log in.

☐

Unofficial Service Records (for certifications purposes only)

☐

Unofficial Transcripts

### Exiting Employees:

☐

Official Service Records- Indicate resignation date: \_\_\_\_\_

☐

Transcripts

☐

Other: \_\_\_\_\_

## MAILING INFORMATION

Please tell us how you'd like to receive your records.

☐

BY MAIL or EMAIL\*:

☐

FAX TO: \_\_\_\_\_

☐

PICK UP IN PERSON Additional notes:

\*Please note: records may be mailed to either a personal or district address. If requesting email delivery, it MUST be a district email address.

Please submit your request by mail or email to: Burkburnett ISD  
100 N. Ave D  
Burkburnett, TX 76354

Shana Kau  
HR Benefits and Compensation Specialist

### FOR OFFICE USE ONLY

DATE RECEIVED:

DATE SENT:

ITEMS SENT:

## BISD CONTACTS

| HUMAN RESOURCES     |  |   |
|---------------------|--|---|
| Leah Tunnell        | <i>Assistant Superintendent of Administrative Services</i> | (940)569-3326<br><a href="mailto:leah.tunnell@burkburnettisd.org">leah.tunnell@burkburnettisd.org</a>               |
| Cathy McElroy       | <i>District Receptionist</i>                               | (940)569-3326<br><a href="mailto:cathy.mcelroy@burkburnettisd.org">cathy.mcelroy@burkburnettisd.org</a>             |
| Shaynah Deason      | <i>HR Specialist</i>                                       | (940)569-3326<br><a href="mailto:shaynah.deason@burkburnettisd.org">shaynah.deason@burkburnettisd.org</a>           |
| Shana Kau           | <i>HR Specialist for Benefits &amp; Compensation</i>       | (940)569-3326<br><a href="mailto:shana.kau@burkburnettisd.org">shana.kau@burkburnettisd.org</a>                     |
| PAYROLL             |  |   |
| Christy Steigerwald | <i>Payroll Coordinator</i>                                 | (940)569-3326<br><a href="mailto:christy.steigerwald@burkburnettisd.org">christy.steigerwald@burkburnettisd.org</a> |
|                     |  |   |
|                     |  |   |
|                     |  |   |