



Date: March, 2009  
To: All Principals / Department Heads  
From : Debbie Cabrera, Assistant Superintendent for Business and Finance  
Subject: PAYROLL – END OF YEAR INFORMATION

### **RESIGNATION PROCEDURES:**

#### **OPTION 1:**

Employees resigning effective **June 5, 2009** will be paid the remainder of their compensation over the standard pay periods through August, 2009 and all insurance coverage will continue through August 31, 2009. *No further action is required.*

#### **OPTION 2:**

Employees resigning effective June 5, 2009 may receive a June “payoff” check by submitting a written request to Debbie Cabrera in the Business Office by May 11, 2009. The June “payoff” check will be mailed on June 25<sup>th</sup>. Employees with approval for a June “payoff” check must be clear with their campus and the Personnel Department before their final check will be mailed.

#### **Important Notes For Employees Receiving A June “Payoff” Check:**

- Refer to the End of Year Resignation and/or Retirement Benefit Process instructions attached (Page 3) for the impact on your health insurance and other benefits.
- Direct deposit *will not* be in effect for the last check. Therefore it is imperative that Personnel has your correct mailing address on file.

### **RETIREMENT PROCEDURES:**

#### **OPTION 1:**

Retirees will automatically be mailed a final lump-sum check on June 25, 2009 but must be clear with their campus and the Personnel Department before their final check can be mailed. *No further action is required.*

#### **Important Note for Retirees Receiving Automatic Final Lump Sum Check:**

- Refer to the End of Year Resignation and/or Retirement Benefit Process instructions attached (Page 3) for the impact on your health insurance and other benefits.
- Direct deposit *will not* be in effect for the last check. Therefore it is imperative that Personnel has your correct mailing address on file.

## **OPTION 2:**

Retirees wanting a final check [“*payoff*”] as of **June 5, 2009** must submit their *written* request to Debbie Cabrera in the Business Office by May 11, 2009. After approval, retirees must bring a letter of clearance from the campus to the Payroll Department on June 5th in order to pick up their checks.

### **Important Note for Retirees Receiving “Payoff” As of June 5, 2009:**

- Refer to the End of Year Resignation and/or Retirement Benefit Process instructions attached (Page 3) for the impact on your health insurance and other benefits.
- Direct deposit *will not* be in effect for the last check. Therefore it is imperative that Personnel has your correct mailing address on file.

## **RETIREMENT PROCEDURES (continued):**

### **OPTION 3:**

Retirees wishing to get checks through the summer [“*payout*”] with their final check on **August 27, 2009** must submit a letter to Debbie Cabrera by May 11, 2009.

### **Import Note for Retirees Receiving “Payout” Through August 27, 2009:**

- Refer to the End of Year Resignation and/or Retirement Benefit Process instructions attached (Page 3) for the impact on your health insurance and other benefits.
- Direct deposit *will* be in effect through the summer pay period. Therefore it is imperative that Personnel has your correct mailing address on file.

## **TEACHER RETIREMENT SYSTEM:**

Retirees should contact the Teacher Retirement System of Texas (TRS) immediately for an estimate of retirement benefits and other information. Form TRS 30, “Application for Service Retirement” must be filed with TRS before the effective date of retirement. It is important that all necessary documents be submitted to TRS as soon as possible to prevent delay of the first annuity check. Retirees receiving a “payout” will not have a TRS 7 form sent to Austin until the last paycheck is issued by the district.

## **TEMPORARY SUMMER ADDRESS OR ADDRESS CHANGE ONLY:**

All ten and eleven month employees should look at their upcoming check to verify that the home address shown is correct. This address will be used to *mail* checks during the summer. Employees with a *temporary summer address* change should indicate the address on the attached form. It will be up to the employee to resubmit a change of address back to the permanent address upon their return.

**DIRECT DEPOSITS:**

**Banks/Credit Unions:** Any employee initiating direct deposit with their summer checks must register with the Business Office by **May 11, 2009** so that your May check will serve as the *pre-notice* month. If the Business Office does not notify you of a problem in May, your June check will then be deposited into your bank account. Directions and forms are attached to this memo.

**CONTACT INFORMATION:**

Please call Helen Wilshire at (972) 215-5405 for further clarification of these procedures as needed. Teacher Retirement System of Texas (TRS) (800) 223-8778.

CC: Jack Singley  
Neil Dugger  
Marie Morris  
Robyn Wolters  
Jeanette Severson

**School Year 2008-2009**  
**End of Year Resignation and/or Retirement Insurance Process**

On all insurance policies your coverage will cease on the last day of the calendar month in which your Active Service ends. If you resign at the end of your employment contract and/or school year commitment, your Active Service will end August 31<sup>st</sup>. Insurance will therefore end on August 31<sup>st</sup>. (per HB973).

**Those receiving a final check in June:** Health coverage will continue through August 31, 2009, any final premiums owed will be taken out of the final check. If you wish to terminate your insurance benefits effective June 30, 2009 you may do so by contacting the Benefits Office. (see attached form).

**Those receiving a final check in August:** Health coverage will continue through August 31, 2009. Final premiums will be taken out of your July paycheck. Only payments for Medical Spending Accounts, Dependent Care Accounts and Aetna LTC will be taken out of the August paycheck.

Participants in the Medical Spending and Dependent Care Accounts must utilize their account funds by August 31, 2009. All participants have a 90-day grace period to submit receipts (deadline: November 30, 2009).

**2008-2009 END OF YEAR STOP/CONTINUE BENEFITS**

Name: \_\_\_\_\_

Emp. #: \_\_\_\_\_

My final paycheck will be in June. (Please enter date) \_\_\_\_\_

\_\_\_\_\_ I am requesting to cancel my Insurance effective June 30<sup>th</sup>.

Employee Signature/Date: \_\_\_\_\_

Benefit Staff Received: \_\_\_\_\_

For Office Use Only:

Date Rcvd		Amt.		Posted	
Action		Adj.		COBRA	

**DIRECTIONS FOR COMPLETING**  
**DIRECT DEPOSIT AUTHORIZATION CARD**

1. Provide your name (printed) and employee ID number. Please check with the Business Office or campus secretary if you are unsure of your employee ID number.
2. Indicate either checking or savings account, not both.
3. List the name of your bank.
4. Date and sign the authorization card.
5. Provide a check from the account marked “**VOID**” or authorized signed document from the bank.
6. Send the authorization card to the Payroll Department in the Business Office.

**CHANGE OF ADDRESS or  
SUMMER CHANGE OF ADDRESS**

Please verify with the employees at your campus any change of home mailing address. Payroll checks mailed during the summer months **will be delayed** if we do not have current home addresses or if there is a different summer address. Return this form to the Payroll Office by May 11, 2009

Name _____	Employee No. _____
Street _____	
City, State & Zip _____	
Effective Dates:    June _____    July _____    August _____    Permanent _____	

Name _____	Employee No. _____
Street _____	
City, State & Zip _____	
Effective Dates:    June _____    July _____    August _____    Permanent _____	

Name _____	Employee No. _____
Street _____	
City, State & Zip _____	
Effective Dates:    June _____    July _____    August _____    Permanent _____	