



WHEN YOU DECIDE TO RETIRE

Payroll Information for Certified Employees

- 1) Contact TRS to discuss retirement options and choose your retirement date. NEISD **will not** advise an employee on a retirement date.
- 2) Login to [Lawson Employee Center](#) and submit your Retirement/Resignation Request. The request must be approved by your supervisor before it is processed by Human Resources (HR). If you have questions on how to complete the request, contact HR at (210) 407-0188. Once HR has processed your retirement/resignation request, your retirement date and last work date is updated in their system and the information is routed to Payroll.
 - Please note the timeframe of when you submit your Retirement/Resignation Request could significantly impact when your annuities will begin with TRS. Please ensure you enter your Retirement/Resignation Request prior to your last scheduled work day.
- 3) Your last paycheck will be issued based on the [Payroll Schedules](#). Please submit your resignation/retirement request to HR as soon as possible to ensure that your retirement will not be delayed. Payroll will not be able to give estimates of your last salary paycheck until all information is updated in the Payroll system and we have had sufficient time to review your information. IF an estimate is given to an employee, it is ONLY an estimate, and any information is subject to change.
- 4) Please refer to the [TRS Handbook](#) for information about how your highest annual compensation is calculated by TRS based on TRS reporting Guidelines.
- 5) Your retirement salary payout check will be a **LUMP SUM** of your remaining salary earned. Please note with a higher standard gross amount, per the IRS tax tables this could result in a larger tax withholding deduction on your final salary payout check. If you have questions about how this will affect your taxes, please consult a tax professional or [IRS.gov](#) website. NEISD cannot advise an employee on how your payout will affect your taxes.
- 6) Any unpaid Supplemental Duty paid after your salary payout is TRS compensable pay. This may delay when your Retirement Certification is submitted to TRS. Please refer to the Payroll Schedules to confirm when supplemental duties will be compensated.

- EXAMPLE: Supplemental duty worked in June will be paid in the July check if approved by the established deadlines. That means that your Retirement Certification will not be sent to TRS until the first week of August since all July paychecks have to be reported and processed.

- 7) If you are eligible for a Leave payout of your unused leave, it will be paid on a check **after** your last paycheck. TRS will not be deducted from any leave payout amounts. It **may** take up to two payrolls to process. The leave payout will not affect when you receive your first annuity payment from TRS.
- 8) Retirement Certification (formally TRS 7 form):
 - a. The Retirement Certification is now completed electronically by NEISD once TRS submits the certification to our TRS portal. It is no longer a physical form that is completed.
 - b. TRS typically submits it to the NEISD Portal on/around your established retirement date.
 - c. The certification will be completed by NEISD within 10 days after your last TRS compensable check has been paid.
 - d. The final reports that TRS needs to calculate your payments will be submitted by NEISD the month after your last TRS compensable check is paid.
- 9) Please make note that your paychecks will be deposited into the bank account that is listed in Lawson. If that information changes before your last scheduled work day, please update via [Lawson Employee Center](#). If the change occurs after your last scheduled work day, please contact Payroll immediately at (210) 407-0186.
- 10) If you separate from the district prior to completing your work schedule, overuse of unearned Local Sick, State Personal, or Vacation leave may be docked in your final paycheck (IF APPLICABLE). ***Any docks in pay may affect your year of membership credit service qualification for retirement.*** Please refer to the TRS handbook for more information.
- 11) If you have questions regarding your NEISD benefits or supplemental retirement accounts (403(b)/457(b)/457(b)Roth), contact the Employee Benefits Department at 210-407-0187. Payroll does not have the information to answer questions related to employee benefits or supplemental retirement accounts.
- 12) Your current year W-2 will be mailed to the last address we have on file for you. Please make sure HR has your most current address on file prior to your last scheduled work day. Not having a current address on file with the district may cause a delay in receiving your W-2.
- 13) Please make sure you register for [MyPayInfo](#) prior to your last day of employment so that you can have access to your paycheck stubs and W-2s.

Important Numbers:

Human Resources Department:	(210) 407-0188
Payroll Department:	(210) 407-0186
Benefits Department:	(210) 407-0187

SALARY PAYOUT INFORMATION AND CRITERIA

You **may** be eligible for a lump sum salary payout the month of your retirement **if** all criteria have been met:

1. You are eligible to retire with TRS effective the last day of the month. Please contact TRS to determine eligibility.
2. If you have submitted your retirement through Lawson and it has been approved by HR by the deadline TRS establishes for retirees.
3. Your retirement information is obtained in Payroll prior to processing that month's check.
4. **December Retirees:** You must have enough available leave to cover your absences for the leave dates that will process in the December check plus the dates through your last scheduled workday in December. This will typically include November and December dates. Please reference the [Certified Leave Deduction Schedule](#) to verify which dates would process in the December check for the current school year.
 - **Please note:** You will need to have 90 paid workdays between September 1st and your retirement date to earn a year of membership service credit. **If** you have any unpaid absences (DOCKS) during the fall semester of the year of your retirement, this could affect your retirement date.
 - Payroll DOES NOT advise an employee when they will hit their 90 days on paid status.
5. **May Retirees:** You must have enough available leave to cover your absences for the leave dates that will process in the May check, plus the dates through your last scheduled workday for the current school year. This will typically include April, May, and June dates (IF APPLICABLE). Please reference the [Certified Leave Deduction Schedule](#) to verify which dates would normally process in the May check for the current school year.
6. **Teacher Choice Hours:** Please note that incomplete [Teacher Choice](#) hours could affect your final paycheck/leave payout and/or retirement date (IF APPLICABLE).
 - * **December Retirees:** Please ensure all teacher choice hours are entered prior to the first week of December.

IMPORTANT TRS INFORMATION TO CONSIDER:

[TRS Benefits Handbook](#)

Creditable Membership Service (page 14)

Service credit is earned in one-year increments. Only one year of service may be credited in any one school year. A year of service credit cannot include more than 12 months. For years prior to the 2012-2013 school year, a school year starts on Sept. 1 and ends Aug. 31, or it starts on the date of your employment under a contract or oral or written work agreement that begins on or after July 1 and ends no more than 12 months later. **Starting with the 2012-2013 school year, all TRS members receive service credit based on a standardized school year that begins Sept. 1 and ends Aug. 31.** The TRS standardized school year may not be the same as the instructional year of your employer.

To earn a year of membership service credit, you must work in a TRS-eligible position or receive paid leave from a TRS-eligible position for at least 90 days during the school year. In the last year of employment before retirement, you may earn a year of service credit by working and/or receiving paid leave for each day of the full fall semester, even if that semester is less than 90 days. Effective Sept. 1, 2015, members who are regularly scheduled to work fewer than five days per week may earn a year of service credit by working four and one-half months; however, the member must serve at least four full calendar months during which the member works or receives paid leave for at least eight days each month and the member must also work or receive paid leave for an additional five days that cannot be included in the four full calendar months.

A TRS member may not receive a year of service credit before Dec. 31, except in the year of retirement when a member may earn a full year of service credit by working the entire fall semester.

NOTES:

- For December Retirees, if you have any DOCKS in pay during the fall semester of the year of your retirement, then you will need to have 90 paid days starting from September 1st of the current school year to your retirement date to be eligible for a year of membership service credit.
- The Payroll Department will not advise an employee of any alternate retirement dates if the employee has any docks in pay.

Determining Annual Compensation (page 19)

Annual compensation is another important component in determining the amount of TRS benefits. Your retirement benefits and certain death benefits are based on a percentage of your highest average annual compensation. Annual compensation is the amount of creditable compensation you receive during a 12-month period for service you rendered to your TRS-covered employer. As indicated below, the 12-month period will not always coincide with your contract period or with your employer's instructional year.

- * Beginning with the 2013-14 school year, annual compensation is the amount of creditable compensation for service paid to a TRS member during a 12-month period beginning Sept. 1 and ending Aug. 31 of the next calendar year.
- * Please review the [Certified First Check Month per Work Schedule](#) on the Payroll website if you are unsure of your 1st check month.

REIMBURSEMENT FOR LEAVE UPON SEPERATION

Unused Sick and State Personal Leave

[DEC \(LOCAL\)](#)

Upon resignation from the District, an employee who both (a) has ten consecutive years of NEISD employment immediately preceding the effective date of his or her resignation, **and** (b) is eligible to receive benefits from TRS shall be entitled to reimbursement for any unused local and state personal or sick leave earned in the District. For purposes of this policy provision, a year of NEISD employment means completion of a full school year, rather than a TRS year of service credit.

Leave is paid out at this rate:

State Sick, Local Sick and State Personal Leave earned *prior to July 1, 2005:*

First 80 days: 1/2 of employee's daily rate of pay at time of resignation up to a maximum of \$40/day.

After 80 days: 1/4 of employee's daily rate of pay at time of resignation up to a maximum of \$20/day.

Local Sick and State Personal Leave earned *after July 1, 2005:*

First 80 days: 1/2 of employee's daily rate of pay at time of resignation up to a maximum of \$75/day.

After 80 days: 1/4 of employee's daily rate of pay at time of resignation up to a maximum of \$65/day.

NOT ELIGIBLE FOR LEAVE PAYOUT:

- *Vacation hours for Certified 230-day employees are NOT eligible to be paid out.*
- *Out of District State Personal leave is not paid out by NEISD since it was earned at another school district.*
- Upon reimbursement, the unused portion of the local sick leave balance shall be zeroed out, but the unused portion of the state personal and sick leave balances shall remain intact.
- Leave Payouts are not TRS compensable.

- If you have questions about how a lump sum payout will affect your taxes, please consult your tax professional or IRS.gov. **NEISD cannot advise an employee on how your payout will affect your taxes.** Taxes withheld at the time of payment is based on your current W4 selection and the IRS tax tables.
- Taxes tables are located on the [IRS.gov](https://www.irs.gov) website.