



Subject Spotlight

Summer Pay
for Schools



Today's Topics

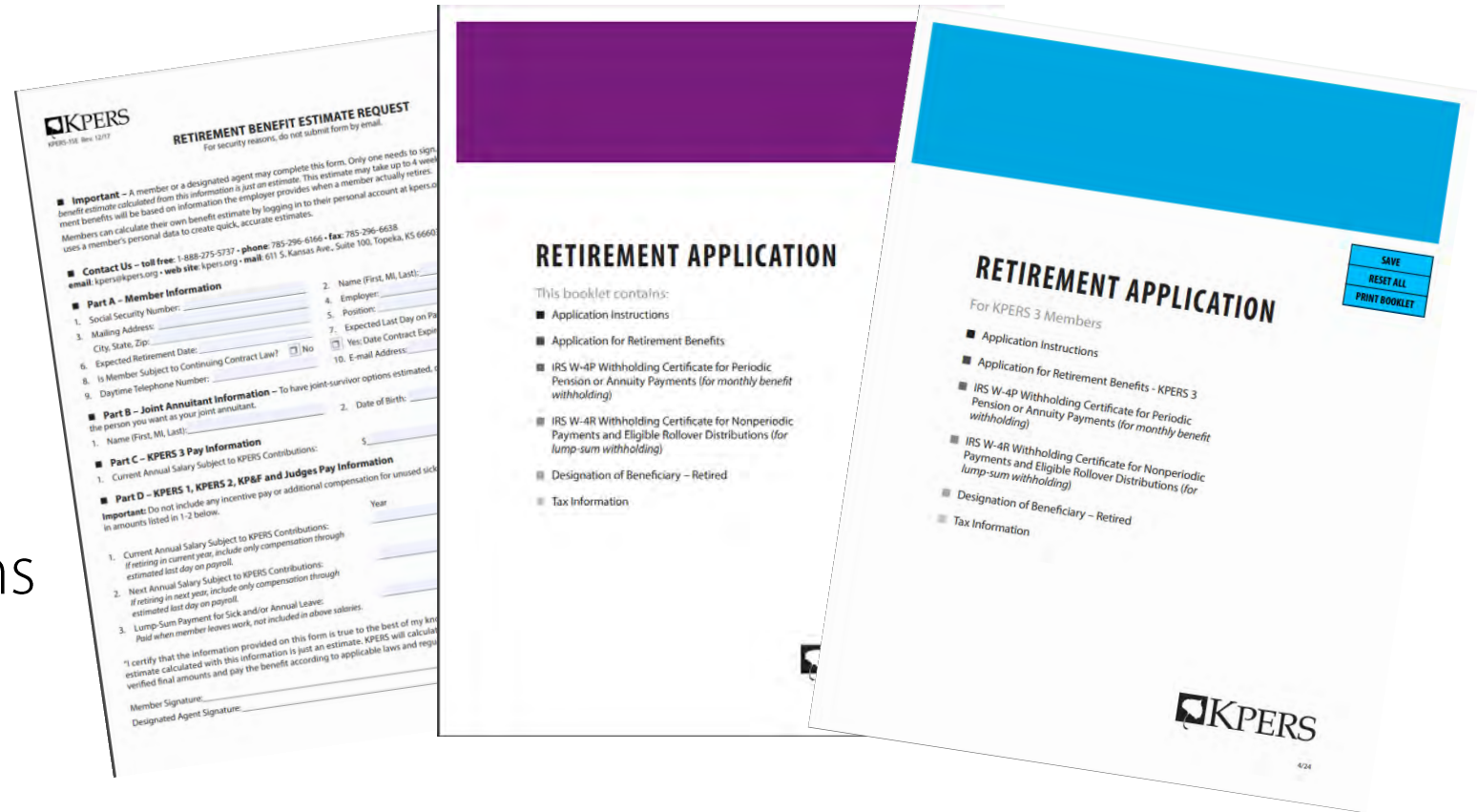
- Prelude to Summer
- Reporting Summer Pay
- Retirement Dates
- Certifications
- Reporting Compensation
- Reporting OGLI



Prelude to Summer

Synopsis

- Enrollments
- PPR
- Estimates
- Retirement Applications





Reporting Summer Pay

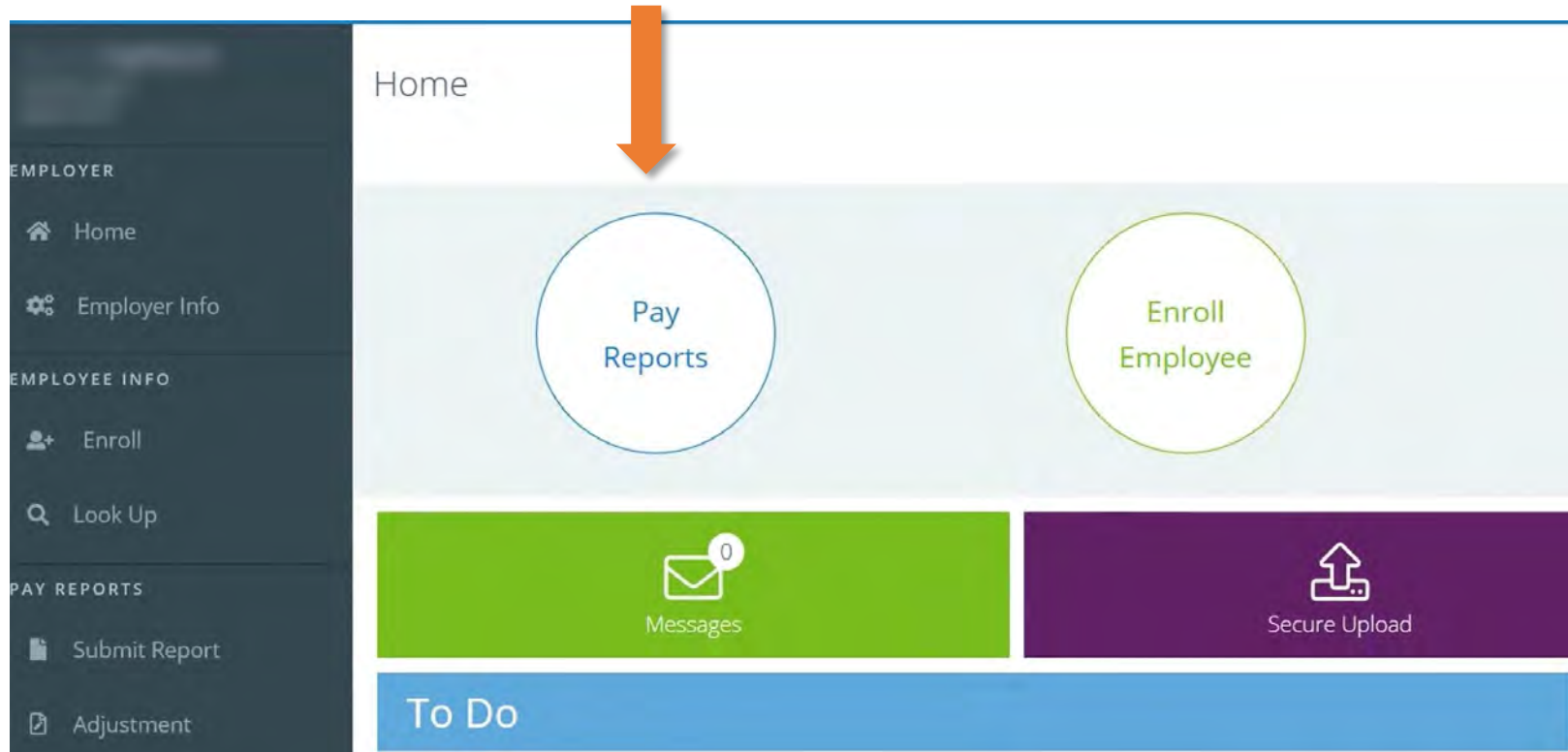
Summer Pay Lump Sum Reporting

- Available with last May pay cycle
- One or two extra steps
- Start just like a regular pay report
- If summer pay will be done in June, wait and report on June pay report.

Reporting Summer Pay

How to Report Summer Pay

Start by clicking on Pay Reports



How to Report Summer Pay

- Choose the right pay cycle and pay date that match when you do summer lump payments.
- Can choose more than one if both have the same pay date.

Employer Pay Reports

You haven't started yet

1. Which plans would you like to report on?

<input type="checkbox"/>	Pay Date	Due Date
<input checked="" type="checkbox"/>	05/07/2018	05/09/2018
<input type="checkbox"/>	05/07/2018	05/09/2018

How to Report Summer Pay

Select Manual or Upload

2. How will you input your data?

Manual Entry Upload File

Download KPERS file to populate in excel

[Download KPERS File](#)

How to Report Summer Pay Upload

- Enter total contributions from records
- Will be considerably higher because of all summer wages being reported in one check

3. Total contributions from your records \$9,240.00

How to Report Summer Pay

- If not including enrollments in pay report upload, choose **No**
- If choosing either of the **yes** options, system will take you to enrollments before uploading

4. Did any employees RETURN to or BEGIN work since your last report?

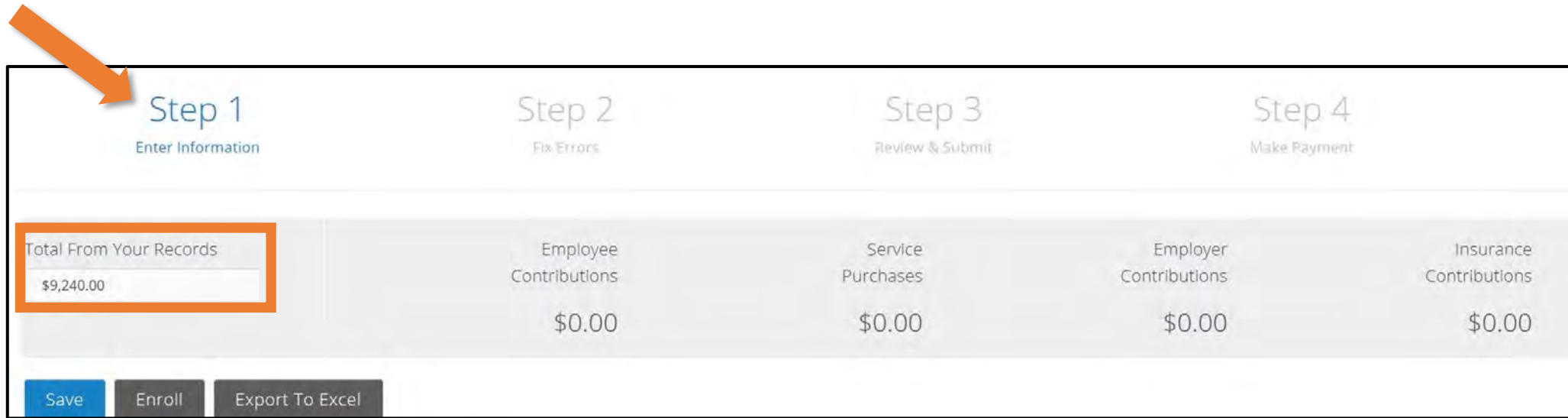
Yes, return to work Yes, new employee No



Reporting Summer Pay

Reporting Lump Sum Money - Step One

Pay information will already be populated if you choose upload



The screenshot displays a four-step process for reporting summer pay. Step 1, 'Enter Information', is highlighted with an orange arrow. Below the steps is a table with the following data:

Total From Your Records	Employee Contributions	Service Purchases	Employer Contributions	Insurance Contributions
\$9,240.00	\$0.00	\$0.00	\$0.00	\$0.00

At the bottom of the form, there are three buttons: 'Save', 'Enroll', and 'Export To Excel'.

Reporting Summer Pay

Reporting Lump Sum - Manual

- If doing manual entry, enter pay information including lump sum wages and contributions
- Click Next

Step 1 Enter Information Step 2 Fix Errors Step 3 Review & Submit Step 4 Make Payment

Total From Your Records \$9,240.00	Employee Contributions \$0.00	Service Purchases \$0.00	Employer Contributions \$0.00	Insurance Contributions \$0.00	Total Contributions \$0.00
---------------------------------------	----------------------------------	-----------------------------	----------------------------------	-----------------------------------	-------------------------------

Save Enroll Export To Excel Autofill Next

SSN	First Name	Last Name	Plan	Wages	EE Contributions	Service Purchase	End Date	Reason
				\$4,000.00	\$240.00	\$0.00	MM/YY	
				\$0.00	\$0.00	\$0.00		
				\$0.00	\$0.00	\$0.00		

Reporting Summer Pay

Reporting Lump Sum - Step Two

- Large lump sum wages will trigger a warning prompting you to apply summer pay
- Choose "Pay Until Date" and pick date that is your agency's last month of summer pay

The screenshot shows a multi-step process for reporting summer pay. The progress bar at the top indicates four steps: Step 1 (Enter Information), Step 2 (Fix Errors), Step 3 (Review & Submit), and Step 4 (Make Payment). Step 2 is currently active. Below the progress bar, there are several input fields: Plan, Pay Cycle, and Pay Until Date, each with a dropdown arrow. To the right of these fields is a blue button labeled "Apply to All". Below the input fields are three buttons: "Save" (blue), "Back" (grey), and "Next" (green). The main area of the screen displays a table with 10 columns: Errors, SSN, First Name, Last Name, Plan, Wages, EE Contributions, Service Purchase, End Date, and Reason. The table shows two rows of data. The first row has a Wages value of \$8,000.00 and EE Contributions of \$480.00. Below the table, a yellow warning banner reads: "Warning - Member with at least 100% wage change, please apply summer pay. If not summer pay contact KPERS".

Step 1
Enter Information

Step 2
Fix Errors

Step 3
Review & Submit

Step 4
Make Payment

Plan Pay Cycle Pay Until Date [Apply to All](#)

[Save](#) [Back](#) [Next](#)

< 1 2 > Displaying 1 - 10 of 17

Errors	SSN	First Name	Last Name	Plan	Wages	EE Contributions	Service Purchase	End Date	Reason
					\$8,000.00	\$480.00	\$0.00	<input type="text"/>	<input type="text"/>
Warning - Member with at least 100% wage change, please apply summer pay. If not summer pay contact KPERS									
					\$8,000.00	\$480.00	\$0.00	<input type="text"/>	<input type="text"/>

Reporting Summer Pay

Summer Pay

- For classified employees who do not receive any pay during the summer, select **“No Summer Pay”** button
- Select this button every month to ensure employee receives service credit over the summer

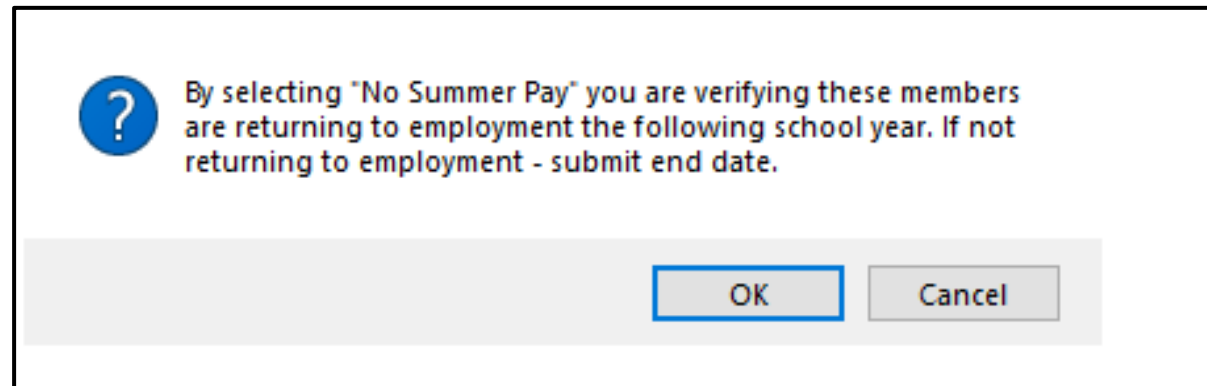
Total From Your Records	Employee Contributions	Service Purchases	Employer Contributions	Insurance Contributions	Total Contributions
\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Buttons: Save, Enroll, Export To Excel, No Summer Pay, Next

SSN	First Name	Last Name	Plan	Wages	EE Contributions	Service Purchase	End Date	Reason
			KPERS	\$0.00	\$0.00	\$0.00		
			KPERS	\$0.00	\$0.00	\$0.00		

Summer Pay

- Message will pop up reminding you to submit an end date for those employees not returning the following school year
- Licensed employees not receiving lump sum pay will have pay information reported like you normally would do on each pay report throughout the summer.



Reporting Summer Pay

Summer Pay

If an employee has a different **“Pay Until Date”** you will click on the SSN of the employee to open pay detail

Summer Pay Applied

< 1 2 > Displaying 1 - 10 of 17

SSN	First Name	Last Name	Plan	Wages	EE Contributions	Service Purchase	End Date	Reason
[SSN]	[Name]	[Name]	KPERS	\$8,000.00	\$480.00	\$0.00		
[SSN]	[Name]	[Name]	KPERS	\$8,000.00	\$480.00	\$0.00		
[SSN]	[Name]	[Name]	KPERS	\$8,000.00	\$480.00	\$0.00		

Reporting Summer Pay

Summer Pay

Choose a different **"Pay Until Date"** and click Save

Pay Reports Details Maintenance

Save

Payroll Detail

Pay Until Date: 2018-07-07

SSN: [Redacted] Member Type: KPERS 1 Member Department: 01

First Name: [Redacted] Initial: R Last Name: [Redacted]

Begin Date: [Calendar Icon] End Date: [Calendar Icon] Reason: [Dropdown]

Gross Wages: \$8,000.00 Adj To Gross Wages: \$0.00 Kpers Wages: \$8,000.00

Payroll Detail Status: Valid Plan: KPERS Employer Rate: 13.21%

Reported Cont: \$480.00 Employee Cont: \$480.00 Employer Cont: \$0.00

Reported Service Purchase Cont: [Redacted] Service Purchase Cont: \$0.00 Service Purchase Factor: 0

Employer Insurance: \$0.00

YTD Total Compensation: \$13,675.00

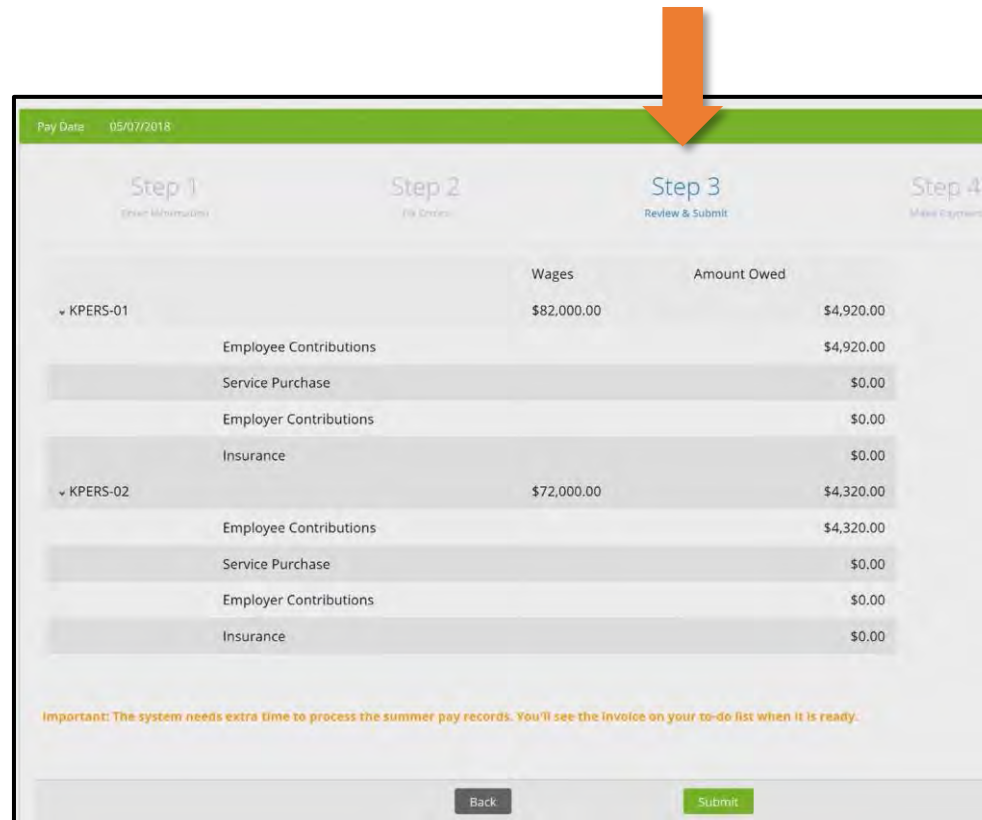
Pay Period Begin Date: 05/01/2018 Pay Period End Date: 05/31/2018

Comments: [Text Area]

Reporting Summer Pay

Summer Lump Sum - Step 3

- Total amount includes regular pay and summer lump sum
- Click Submit



Pay Date: 05/07/2018

Step 1: Enter Information | Step 2: Fill Entries | **Step 3: Review & Submit** | Step 4: Make Payment

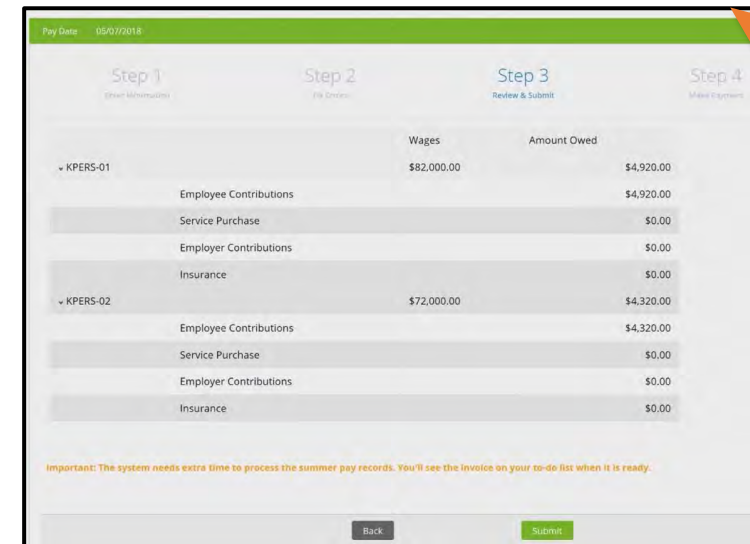
	Wages	Amount Owed
▼ KPERS-01	\$82,000.00	\$4,920.00
Employee Contributions		\$4,920.00
Service Purchase		\$0.00
Employer Contributions		\$0.00
Insurance		\$0.00
▼ KPERS-02	\$72,000.00	\$4,320.00
Employee Contributions		\$4,320.00
Service Purchase		\$0.00
Employer Contributions		\$0.00
Insurance		\$0.00

Important: The system needs extra time to process the summer pay records. You'll see the invoice on your to-do list when it is ready.

Back Submit

Summer Lump Sum - Step 4

- System does not process summer pay invoices like regular pay reports
- Needs time to calculate and validate the amount and spread them evenly over the summer months
- Invoice will show up in **TO Do List** when ready




	Wages	Amount Owed
▼ KPERS-01	\$82,000.00	\$4,920.00
Employee Contributions		\$4,920.00
Service Purchase		\$0.00
Employer Contributions		\$0.00
Insurance		\$0.00
▼ KPERS-02	\$72,000.00	\$4,320.00
Employee Contributions		\$4,320.00
Service Purchase		\$0.00
Employer Contributions		\$0.00
Insurance		\$0.00

Important! The system needs extra time to process the summer pay records. You'll see the invoice on your to-do list when it is ready.



Retirement Dates

Summer Pay Cheat Sheet


CHEAT SHEET

Summer Pay for Retiring School Employees

Licensed positions on 12-month contracts

Contract End Date	Retirement Date	End Date	Report	Don't Report	Board of Ed Licensed Positions <ul style="list-style-type: none"> Educator (Teacher, etc) Audiologist Speech pathologist Occupational therapists Physical therapists Social worker Registered nurse Dietitian Licensed professional counselor Psychologist Orientation and mobility instructor
July 31	June 1	May 31	Pay thru May 31	June, July or add-on pay	
	July 1	June 30	Pay thru June 30	July or add-on pay	
	Aug 1	July 31	All pay, including add-on*	n/a	
Aug 31	June 1	May 31	Pay thru May 31	June, July, Aug or add-on pay	
	July 1	June 30	Pay thru June 30	July, Aug or add-on pay	
	Aug 1	July 31	Pay thru July 31	Aug or add-on pay	
	Sep 1	Aug 31	All pay, including add-on*	n/a	

Principals, administrators and superintendents

Contract End Date	Retirement Date	End Date	Report	Don't Report
June 30	June 1	May 31	Pay thru May 31	June or add-on pay
	July 1	June 30	All pay, including add-on*	n/a
July 31	June 1	May 31	Pay thru May 31	July, July or add-on pay
	July 1	June 30	Pay thru June 30	July or add-on pay
	Aug 1	July 31	All pay, including add-on*	n/a

Classified staff (cooks, secretaries, paras, bus drivers, custodians and other hourly employees)

If They...	End Date	Report
Work 9 or 10 months and receive pay over 12 months	Last day of the month before retirement date	All pay, including summer checks & add-on pay*
Work 9 or 10 months and receive pay over 9 or 10 months	Actual last day worked	All pay, including add-on pay*
Work and receive pay over 12 months	Actual last day worked	All pay through retirement date, including add-on pay*

* If membership date allows: Before **July 1, 1993**, add-on pay; On or after **July 1, 1993**, no add-on pay.
 Employers must pay all compensation owed to the employee in a lump sum by the first payroll date after their selected retirement date. This includes payment of the remainder of any contract pay.

GO TO kpers.org/employers
INFOLINE: 1-888-275-5737
EMAIL: employers@kpers.org
SUMMER PAY

6/23

All Non-School and School Non-Licensed (classified)

- 12 available retirement dates
- May retire the **first** of the month following their last day on payroll

Compensation and End Dates

Classified staff (cooks, secretaries, paras, bus drivers, custodians and other hourly employees)

If They...	End Date	Report
Work 9 or 10 months and receive pay over 12 months	Last Day of the Month or Last Day of the Pay Period	All pay, including summer checks & add-on pay*
Work 9 or 10 months and receive pay over 9 or 10 months	Actual last day worked	All pay, including add-on pay*
Work and receive pay over 12 months	Actual last day worked	All pay through retirement date, including add-on pay*

* If hire date allows: Before July 1, 1993, **add-on pay**; On or after July 1, 1993, **no add-on pay**

Compensation to report begins with a regular calendar year.

School-Licensed (certified)

- Teachers – As early as June 1, if work under contract is complete
- Principals and Superintendents – As early as June 1, if work under contract is complete
- Any of the summer months if work under contract is complete
- If using additional pay, first of the month after the end of the contract

Reporting Money for School Certified

Reported compensation is based on a calendar year.

Licensed positions on 12-month contracts

Contract End Date	Retirement Date	End Date	Report	Don't Report	Board of Ed Licensed Positions
July 31	June 1	May 31	Pay thru May 31	June, July or add-on pay	
	July 1	June 30	Pay thru June 30	July or add-on pay	
	Aug 1	July 31	All pay, including add-on*	n/a	
Aug 31	June 1	May 31	Pay thru May 31	June, July, Aug or add-on pay	
	July 1	June 30	Pay thru June 30	July, Aug or add-on pay	
	Aug 1	July 31	Pay thru July 31	Aug or add-on pay	
	Sep 1	Aug 31	All pay, including add-on*	n/a	

- Educator (Teacher, etc)
- Audiologist
- Speech pathologist
- Occupational therapists
- Physical therapists
- Social worker
- Registered nurse
- Dietitian
- Licensed professional counselor
- Psychologist
- Orientation and mobility instructor

Principals, administrators and superintendents

Contract End Date	Retirement Date	End Date	Report	Don't Report
June 30	June 1	May 31	Pay thru May 31	June or add-on pay
	July 1	June 30	All pay, including add-on*	n/a
July 31	June 1	May 31	Pay thru May 31	July, July or add-on pay
	July 1	June 30	Pay thru June 30	July or add-on pay
	Aug 1	July 31	All pay, including add-on*	n/a

Scenario 1

Delores is a teacher at KPERS Middle School. Her contract ends August 31. She will be retiring June 1.

- What is her end date?
- What compensation will you report?

Retirement Dates

Scenario 1

Licensed positions on 12-month contracts

Contract End Date	Retirement Date	End Date	Report	Don't Report	Board of Ed Licensed Positions
July 31	June 1	May 31	Pay thru May 31	June, July or add-on pay	<ul style="list-style-type: none">• Educator (Teacher, etc)• Audiologist• Speech pathologist• Occupational therapists• Physical therapists• Social worker• Registered nurse• Dietitian• Licensed professional counselor• Psychologist• Orientation and mobility instructor
	July 1	June 30	Pay thru June 30	July or add-on pay	
	Aug 1	July 31	All pay, including add-on*	n/a	
Aug 31	June 1	May 31	Pay thru May 31	June, July, Aug or add-on pay	
	July 1	June 30	Pay thru June 30	July, Aug or add-on pay	
	Aug 1	July 31	Pay thru July 31	Aug or add-on pay	
	Sep 1	Aug 31	All pay, including add-on*	n/a	

- End date: **May 31**
- Report: **Pay thru May 31**

Scenario 2

Kenneth is the principal of KPERS High School. His contract ends June 30. He is retiring July 1.

- What is his end date?
- What compensation will you report?

Retirement Dates

Scenario 2

Principals, administrators and superintendents

Contract End Date	Retirement Date	End Date	Report	Don't Report
June 30	June 1	May 31	Pay thru May 31	June or add-on pay
	July 1	June 30	All pay, including add-on*	n/a
July 31	June 1	May 31	Pay thru May 31	July, July or add-on pay
	July 1	June 30	Pay thru June 30	July or add-on pay
	Aug 1	July 31	All pay, including add-on*	n/a

- End date: **June 30**
- Report: **Pay thru June 30**

Scenario 3

Tim is a teacher at KPERS High School. He was hired prior to July 1, 1993. He is retiring September 1.

- What is his end date?
- What compensation will you report?

Retirement Dates

Scenario 3

Licensed positions on 12-month contracts

Contract End Date	Retirement Date	End Date	Report	Don't Report	Board of Ed Licensed Positions
July 31	June 1	May 31	Pay thru May 31	June, July or add-on pay	<ul style="list-style-type: none">• Educator (Teacher, etc)• Audiologist• Speech pathologist• Occupational therapists• Physical therapists• Social worker• Registered nurse• Dietitian• Licensed professional counselor• Psychologist• Orientation and mobility instructor
	July 1	June 30	Pay thru June 30	July or add-on pay	
	Aug 1	July 31	All pay, including add-on*	n/a	
Aug 31	June 1	May 31	Pay thru May 31	June, July, Aug or add-on pay	
	July 1	June 30	Pay thru June 30	July, Aug or add-on pay	
	Aug 1	July 31	Pay thru July 31	Aug or add-on pay	
	Sep 1	Aug 31	All pay, including add-on*	n/a	

- End date: **August 31**
- Report: **All Pay, including add-ons**

Scenario 4

Helen is a cook at KPERS Elementary School. Her membership date was prior to July 1, 1993. She works 9 months out of the year. Her last day will be May 23. She is retiring June 1.

- What is her end date?
- What compensation will you report?

Retirement Dates

Scenario 4

Classified staff (cooks, secretaries, paras, bus drivers, custodians and other hourly employees)

If They...	End Date	Report
Work 9 or 10 months and receive pay over 12 months	Last day of the month before retirement date	All pay, including summer checks & add-on pay*
Work 9 or 10 months and receive pay over 9 or 10 months	Actual last day worked	All pay, including add-on pay*
Work and receive pay over 12 months	Actual last day worked	All pay through retirement date, including add-on pay*

- End date: **May 23**
- Report: **All Pay, including add-ons**

Scenario 5

Benjamin is a bus driver at KPERS Elementary School. His membership date was after July 1, 1993. He works on a 10-month contract. His last day will be July 10. He is retiring August 1.

- What is his end date?
- What compensation will you report?

Retirement Dates

Scenario 5

Classified staff (cooks, secretaries, paras, bus drivers, custodians and other hourly employees)

If They...	End Date	Report
Work 9 or 10 months and receive pay over 12 months	Last day of the month before retirement date	All pay, including summer checks & add-on pay*
Work 9 or 10 months and receive pay over 9 or 10 months	Actual last day worked	All pay, including add-on pay*
Work and receive pay over 12 months	Actual last day worked	All pay through retirement date, including add-on pay*

- End date: **July 10**
- Report: **All Pay**

Scenario 6

Tina is the IT director at KPERS Middle School. She is a 10-month employee paid over 12-month. Her last day working is May 21. She is retiring June 1.

- What is her end date?
- What compensation will you report?

Retirement Dates

Scenario 6

Classified staff (cooks, secretaries, paras, bus drivers, custodians and other hourly employees)

If They...	End Date	Report
Work 9 or 10 months and receive pay over 12 months	Last day of the month before retirement date	All pay, including summer checks & add-on pay*
Work 9 or 10 months and receive pay over 9 or 10 months	Actual last day worked	All pay, including add-on pay*
Work and receive pay over 12 months	Actual last day worked	All pay through retirement date, including add-on pay*

- End date: **May 31**
- Report: **All Pay**



Certifications

Certification

Designated Agent completes certification in the Employer Web Portal. Will show up on the "To Do List".

- Certification shows up within 30 days of retirement date.
- Do not have to wait until PPR is completed.
- Complete as soon as possible.
- Respond to all KPERS inquiries regarding retirement.

Retirement benefit could be DELAYED

Certification

Different Types


- Retirement
- Withdraw
- Death
- Disability

The screenshot displays a software interface with a dark grey sidebar menu on the left and a white 'To Do' panel on the right. The sidebar menu includes the following items: 'Adjustment' (with a document icon), 'MISC', 'Invoices' (with a dollar sign icon), and 'Certification' (with a document icon). An orange arrow points upwards from the bottom of the 'Certification' menu item. The 'To Do' panel has a blue header and lists three items: 'Pay Reports (3)', 'Retirement Certification (4)', and 'Verify Rates (1)'. An orange arrow points from the right towards the 'Retirement Certification (4)' item.

Certification School

Verify last day on payroll is last day compensation was earned.

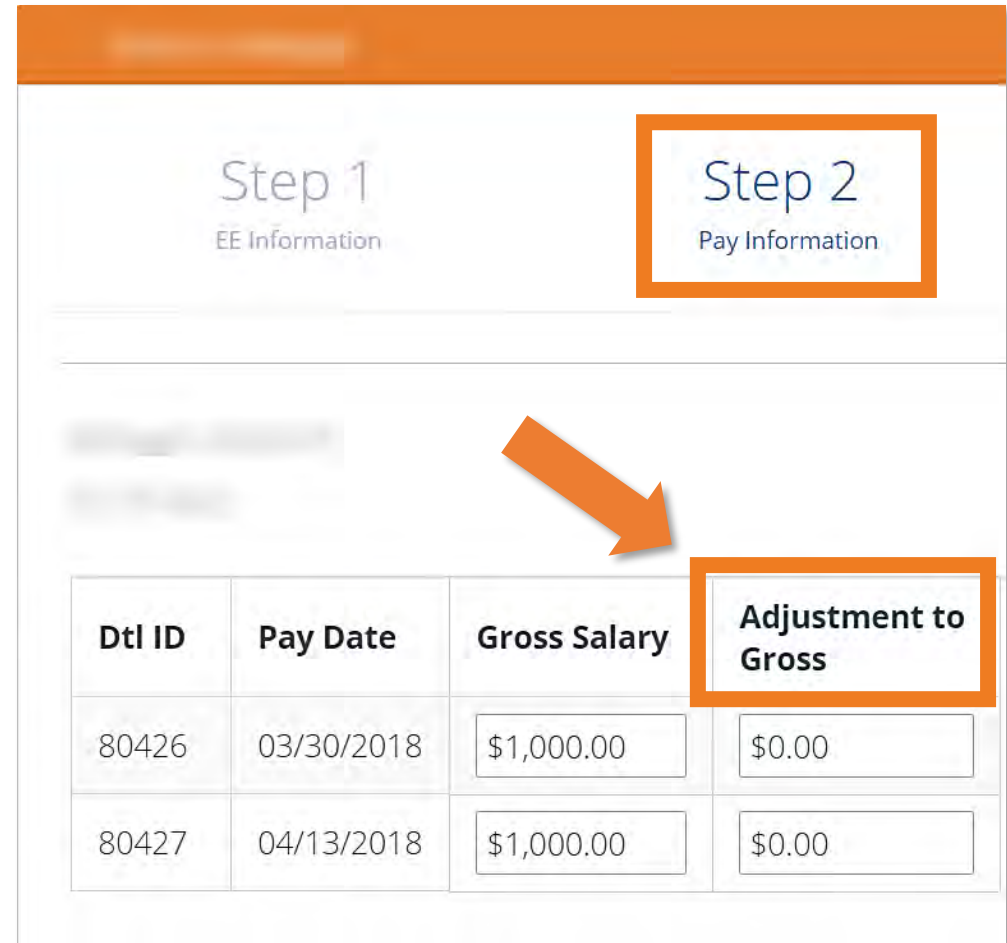
- Licensed employees: last day of the month
- Classified employees: last day earning compensation

Position At Retirement <input type="text"/>	Last Day on Contract <input type="text"/> 
Last Date on Payroll 07/31/2021	This is the date in our system. <input type="radio"/> Yes <input type="radio"/> No Is this correct?
Does member work 9,10,12 months? <input type="radio"/> 9 <input type="radio"/> 10 <input type="radio"/> 12	
Is this member paid in 9, 10, or 12 monthly installments? <input type="radio"/> 9 <input type="radio"/> 10 <input type="radio"/> 12	
How was the employee paid in previous school year? <input type="radio"/> 9 <input type="radio"/> 10 <input type="radio"/> 12	
Has member received all money due within one pay period of the last day on payroll? <input type="radio"/> Yes <input type="radio"/> No	
<input type="button" value="Next"/>	

Position at retirement and school questions must be answered.

Adjustment to Gross

- Enter any amount not reportable to KPERS
- Don't enter summer pay
- Don't enter add on pay that is **reportable** to KPERS



Step 1
EE Information

Step 2
Pay Information

Dtl ID	Pay Date	Gross Salary	Adjustment to Gross
80426	03/30/2018	\$1,000.00	\$0.00
80427	04/13/2018	\$1,000.00	\$0.00

Add-on Pay

- Click 'new' and create a new line for each type of add-on.
- Enter add-on amount
- Enter correct year for each add-on.
- Add detailed comments to report **any** discrepancies in pay.

The screenshot shows a three-step process for adding pay. Step 3, 'Add On Pay', is highlighted with an orange box. Below the steps are '+ New' and 'Delete' buttons. A table contains one entry: Add On Amt: \$185.00, Add On Type: Sick Leave Payment, Year: 2018. A dropdown menu is open for the 'Add On Type' field, showing options: Annual Leave/Vacation Payment, Comp Time Payment, Other, and Sick Leave Payment. A 'Back' button and a green 'Next' button are at the bottom.

Add On Amt	Add On Type	Year	Comments
\$185.00	Sick Leave Payment	2018	

Message ID	Message	Severity
No records to display.		

Report sick leave, vacation leave, and overtime separately.



Reporting Compensation

Do Not Withhold or Report to KPERS

- Early Retirement Incentives
- Bridge Payments Tied to Early Retirement Incentives
- Severance Pay



Add-On Pay

Membership date **before July 1, 1993** or in “**Year of Service**”,

Take KPERS Contributions from:

- Unused Sick Leave
- Annual (Vacation) Leave
- Kelly Days
- PTO/ Personal Days
- Longevity Pay only paid at retirement
- Retirement Bonus
- Bonus Sick Leave



Compensation

Take KPERS Contributions from:

- **Longevity Paid Yearly**
- **Insurance Reimbursement**
- **Holiday Pay**
- **Overtime**
- **Bonuses**
 - Signing
 - Merit
 - Retention
 - IR
 - To Take or Keep a Position
 - Early Notification
 - Any Bonus not tied to Termination

Reporting Compensation

Leaving Employment Information

Standard Insurance Company

844-289-2306 Tel 971-321-5033 Fax
800 SW Jackson, Ste 1110, Topeka, KS 66612

INSTRUCTIONS – PLEASE READ CAREFULLY

Portability Of Insurance

You may be eligible to buy portable Group Life Insurance if your employment with your employer terminates. If KPERS' Group Life Insurance plan includes Accidental Death and Dismemberment (AD&D) and/or Dependents Insurance, you may also be eligible to buy those coverages.

To be eligible, you must meet the following criteria:

1. You must be able to perform which you are reasonably fit
2. You must be under age 80 on the day you terminate employment
3. If you do not buy Life Insurance

The minimum and maximum amount of insurance you can convert depends on the reason for the cessation of your group insurance coverage. If your group life insurance coverage ended for any reason other than your failure to make a required premium contribution or the termination of the group policy, the maximum amount you can convert is the amount of your life insurance which ended. If your life insurance ended because of the termination or amendment of the group policy, or if your insurance has been reduced, then the amount you can convert may be different. Please refer to your Certificate of Insurance or contact your local office for a full description regarding the amount you may be entitled to convert.

NOTE: Refer to the Right To Convert to an Individual Life Insurance Provision and Insurance You Buy Before Your Employment Terminates. If you convert your group insurance coverage, you'll have continued protection with premiums payable to age 100. This policy will accumulate cash value, and will allow you to borrow against the cash value if sufficient. Interest on the policy loan will accrue daily and will be at a fixed rate (subject to policy terms and applicable state law). The policy does not share in dividends.

If you are terminating employment due to sickness or injury, please contact your local office to determine eligibility for disability Waiver of Premium benefits before completing this application for conversion.

To calculate your premium payments, use the attached Schedule of Rates and worksheet or the Group Conversion Calculator found at www.standard.com/mybenefits/kpers/conversion_premium.html.

To complete the conversion, you must return the enclosed application form and your check for the first premium payment within 60 days after the termination of your group insurance. Your application to convert your insurance may not be valid if received in our office after this 60 day period. If you had group life insurance on your dependents and want to convert their coverage also, please contact us for additional applications. This application will be attached to and made part of the policy.

If you have any questions about the application or other conversion options, contact your local office at 844-289-2306 or KPERAdmin@standard.com for assistance. We look forward to continuing to provide you with life insurance protection.

Kansas Public Employees Retirement System (KPERS) Group Life Portability Insurance Application

Standard Insurance Company

844-289-2306 Tel 971-321-5033 Fax
800 SW Jackson, Ste 1110, Topeka, KS 66612

Kansas Public Employees Retirement System (KPERS) Group Conversion Packet

Thank you for asking for more information about converting your group term life insurance to individual coverage.

If you are terminating employment due to sickness or injury, please contact your local office to determine eligibility for disability Waiver of Premium benefits before completing this application for conversion.

If you convert your group insurance coverage, you'll have continued protection with premiums payable to age 100. This policy will accumulate cash value, and will allow you to borrow against the cash value if sufficient. Interest on the policy loan will accrue daily and will be at a fixed rate (subject to policy terms and applicable state law). The policy does not share in dividends.

The amount of insurance you may convert depends on the reason for the cessation of your group insurance coverage. If your group life insurance coverage ended for any reason other than your failure to make a required premium contribution or the termination of the group policy, the maximum amount you can convert is the amount of your life insurance which ended. If your life insurance ended because of the termination or amendment of the group policy, or if your insurance has been reduced, then the amount you can convert may be different. Please refer to your Certificate of Insurance or contact your local office for a full description regarding the amount you may be entitled to convert.

To calculate your premium payments, use the attached Schedule of Rates and worksheet or the Group Conversion Calculator found at www.standard.com/mybenefits/kpers/conversion_premium.html.

To complete the conversion, you must return the enclosed application form and your check for the first premium payment within 60 days after the termination of your group insurance. Your application to convert your insurance may not be valid if received in our office after this 60 day period. If you had group life insurance on your dependents and want to convert their coverage also, please contact us for additional applications. This application will be attached to and made part of the policy.

If you have any questions about the application or other conversion options, contact your local office at 844-289-2306 or KPERAdmin@standard.com for assistance. We look forward to continuing to provide you with life insurance protection.

Leaving Employment and Your Retirement System Benefits



If you're leaving employment, you may have questions about what will happen to your benefits. If you don't withdraw your contributions, you will become an inactive member. You'll still have access to your online account at kpers.org. And we'll continue to provide you with annual statements.

Life Insurance

Generally, your basic life insurance and any optional coverage ends when you leave employment or move to a position not covered by KPERS. However, you can continue some or all of your current coverage on your own. You have 60 days after you end employment to submit your form. You have two options:

1. Individual whole life insurance
2. Portable term life insurance

Conversion and Portability Election forms explain the benefits and costs for each option. You can get these forms from your employer or download them at kpers.org.

Note: KPERS members do not have basic life insurance coverage. KPERS members moving to a Board of Regents position keep their life insurance coverage.

Guaranteeing Your Benefit

When you are "vested," it means you have earned enough service to guarantee a retirement benefit, even if you leave covered employment.

- KPERS members vest their benefit with five years of service.
- KPERS members vest their benefit with 15 years (Tier II members) or 20 years (Tier I members).

Your vested status is an important consideration when deciding whether to withdraw your member contributions and interest.

If You Are Vested

You are guaranteed a monthly retirement benefit for the rest of your life if you leave your contributions in your account. Often, your vested benefit is more valuable than the amount of your actual contributions. You can apply for retirement benefits when you become eligible. You can continue to earn interest in the meantime, and you can withdraw at any time if you change your mind.

If You Are Not Vested

You are not guaranteed a retirement benefit. You need to withdraw your member contributions and interest within five years of the date you end employment. Your account earns interest for five years (two years for KPERS 3 members). After five years, you forfeit your service. If you don't withdraw and you return to KPERS employment within five years, you'll keep your past public service. But you'll return as a KPERS 3 member.



Important Points to Consider Now

- You have 60 days to submit your life insurance continuation form.
- If you're vested, you're guaranteed a retirement benefit.
- If you're not vested, you need to withdraw within five years.
- You can withdraw after 31 days.
- If you withdraw, a direct rollover is the best way to avoid federal taxes and penalties.
- We don't have your personal contact information. Please complete and return the address form on page 2. You can also update your address in your online account or email kpers@kpers.org.

Retirement Checklist for Employer

- Ask member if a retirement estimate was completed
- Enter end date in the EWP as soon as possible (up to 90 days ahead)
- Provide member the Application for Retirement Benefits
- Provide life insurance conversion and portability forms
- Discuss Working After Retirement rules
- If member is in a service purchase, have them contact KPERS as soon as possible
- Complete retirement certification on the EWP























Reporting OGLI

How to Report OGLI

- 9 or 10-month employee – Paid over 9 or 10-months.
 - Start collecting premiums for summer months with March-May checks.
- 12-month employee continue to report on monthly premium as usual.

How to Report OGLI

- Employees getting a lump sum payment in May:
 - Deduct premiums for May-August.
 - Include all summer premiums on the May premium report.
 - If paying thru August mark August on Summer Pay Month.

Plan	Member Premium	Spouse Premium	Child Premium	Total Premium	End Date	Reason	Summer Pay Month
KPERS	\$14.85	\$0.00	\$0.00	\$14.85	05/25/2022 	Termination 	
KPERS	\$7.50	\$8.70	\$0.00	\$16.20			
KPERS	\$8.00	\$0.00	\$0.00	\$8.00			August  
KPERS	\$22.20	\$0.00	\$0.00	\$22.20			August 
KPERS	\$15.80	\$0.00	\$0.00	\$15.80			August 
KPERS	\$11.20	\$0.00	\$2.20	\$13.40			



Who to Contact

Who to Contact

Contact KPERs

	 KPERs GENERAL QUESTIONS	 KPERs REPORTING	 KPERs OPTIONAL LIFE	 kpers457 ALL QUESTIONS
Toll-Free	1-888-275-5737	1-844-468-8929	1-844-468-8929	1-800-232-0024 participants/employees
Topeka	785-296-6166	785-268-6886	785-268-6886	1-833-232-0024 employers only
Email	employers@kpers.org	kpersFS@kpers.org	ogli_fs@kpers.org	kpers457@kpers.org
Fax	1-785-296-6638	1-785-256-9503	1-785-256-9503	n/a
Mail	611 S. Kansas Ave Suite 100 Topeka, KS 66603	611 S. Kansas Ave Suite 100 Topeka, KS 66603	611 S. Kansas Ave Suite 100 Topeka, KS 66603	P.O. Box 173764 Denver, CO 80217-3764
Web	kpers.org	kpers.org	kpers.org/optionallife	kpers457.org

Thank You!

Questions?

