

New Changes & New Challenges

2020 Fall Employer Virtual Workshop



Ad astra per aspera
To the stars through difficulty



Housekeeping



Housekeeping

- Unmute when you would like to speak or raise a hand.
- Can use the Chat box if you prefer.
- Announce name before speaking
- Set cell phones to vibrate.
- Minimize distractions
- Interact, discuss, and ask questions.



Today's Topics

- COVID-19 and KPERS
- Membership
- Problem-Solving
- EWP Drive-Thru
- Leaving Employment
- KPERS 3
- Retirement
- Training Opportunities

COVID-19



COVID-19 Poll Question

What is your current work situation?

- Working full-time at home?
- Working full-time at the office?
- Working ½ time at home and ½ time at the office?
- Other?



COVID-19 Discussion Topic

How has COVID-19 affected your ability to do your job as a Designated Agent or contact?

- New employee orientation
- Staff training
- Health and benefit fairs

CARES ACT

- KPERS is a 401(a) Defined Benefit Plan.
- Members of KPERS can't withdraw or borrow from their account while actively working for a KPERS employer.
- Inactive members who withdraw can waive the Federal tax withholding by submitting a KPERS-19 form.
- Check with your personal savings plan for COVID relief.

Furloughs – Reduced Hours

- If hours have been reduced but still in a covered position, no need to do anything on PPR
- Keep track of “Actual Pay” vs. “Regular Pay”

No pay due to COVID-19

Only use the COVID button if an employee has COVID-19 or caring for a family member with COVID-19.

Furloughs Using 10 Days or More in a Row off Payroll

- Considered a “Break in Service”
- Put member on Administrative Leave of Absence
- Upon their return, end date with Reason Code “Return to Payroll”
- Keep track of “Actual Pay” vs. “Regular Pay”

The COVID button should not be used in a furlough situation caused by budgetary constraints.

Early Retirement Incentives

A bonus or severance paid to all retiring employees because of their pending retirement.

- Do NOT deduct KPERS contributions
- Contact KPERS regarding the incentive

A member doesn't have to collect their KPERS benefit at this time.

WAR and COVID-19

- WAR rules remain in place currently for general staffing needs.
- If due to a COVID-19 situation, your agency finds it necessary to hire a retiree still within their mandatory waiting period, then KPERS may be in a position to grant a waiver.
- If the retiree is filling a position that is based on the employer's general staffing needs, an exception would not be possible.

WAR and COVID-19

- KPERS will need a letter on your agency's letterhead indicating that the needed utilization of a recent KPERS retiree is the result of the pandemic.
- Should the waiver be granted, your agency will not have to pay the KPERS Working after Retirement assessment on the retiree.
- **Schools:** any approved waiver only applies to 2020-2021 school year
Non-School: any approved waiver only applies through 2020 (re-evaluate in 2021 as needed).
- Contact Heather McHardie at hmchardie@kpers.org

Membership



Membership

Non-School

Is this position eligible?

- Covered by Social Security?
- At least 1,000 hours of paid work per year?
- Continuously or consistently employed?
- Not temporary or seasonal?
- Working directly for the affiliated employer?

School

Is this position eligible?

- Covered by Social Security?
- At least 630 hours of paid work per year?
- Continuously or consistently employed?
- Not temporary or seasonal?
- Working directly for the affiliated employer?

Enroll member at least a day before generating Pay Period Report

Do NOT Enroll

- Substitute teachers without a contract
- Certain Licensed state nurses
- Certain state law enforcement instructors
- Legislative staff

Exception does not apply to waiting period or prearrangement

Membership

Self-Audit on a regular basis

- Track hours and review membership
- Make note of position changes/membership changes in personnel file
- Have the job description state if the position is KPERS-covered and list the hours expected to work
- Make sure non-covered person stays below the KPERS covered hours

End Dates

Start dates & end dates are very important:

- To track service credit accurately.
- To report wages accurately.
- For the withdrawal process.

Start Date	End Date
06/15/1998	Enter Date

(in employee record)

Beneficiary Forms – KPERS 7/99 Active

- Only new employees or those without a beneficiary form need to register beneficiaries with KPERS
- Active members should verify their beneficiaries on file are current
- Members can check beneficiaries in the Member Web Portal
- Send to KPERS through Secure Upload, fax, or mail



DESIGNATION OF BENEFICIARY

For security reasons, do not submit form by e-mail.

SAVE

RESET

PRINT

■ **Important** – You have the option to make beneficiary changes in your online account at kpers.org. *Changes online or with this form replace all previous designations.* Read instructions on page 3. If you have more beneficiaries than spaces in any category, please use an Additional Beneficiaries page. Do not attach plain paper or continue on the back of this form. Additional pages must be attached to this completed form to be valid.

☐ Mark this box if you are using additional pages.

■ **Contact Us** – toll free: 1-888-275-5737 • phone: 785-296-6166 • fax: 785-296-6638
email: kpers@kpers.org • web site: www.kpers.org • mail: 611 S. Kansas Ave., Suite 100, Topeka, KS 66603

■ Part A – Member Information

1. Social Security Number:	<input type="text"/>	2. Name (First, MI, Last):	<input type="text"/>
3. Telephone Number:	<input type="text"/>	4. Mailing Address:	<input type="text"/>
5. Employer:	<input type="text"/>	City, State, Zip:	<input type="text"/>

■ **Part B – Primary Beneficiary for KPERS Retirement Benefits** – Includes accumulated contributions and interest. Each beneficiary will share your benefit equally. *You must name a primary beneficiary in this section.*

Problem-Solving



Use Employer Manual

KPERS Employer Manual	Revised
About KPERS (PDF, 110KB)	4/19
Contacting KPERS (PDF, 134KB)	5/19
KPERS.org Public website (PDF, 484KB)	5/19
Designated Agent (PDF, 254KB)	4/19
Employer Web Portal (EWP) KPERS Employers Only (PDF, 315KB)	4/19
Membership - Non-School (PDF, 461KB)	7/19
Membership - School (PDF, 435KB)	2/20
Beneficiary (PDF, 163KB)	4/19
Member Benefits (PDF, 224KB)	4/19
Service Credit (PDF, 360KB)	4/19
Optional Group Life Insurance (OGLI) (PDF, 507KB)	5/19
Leaving Employment (PDF, 424KB)	2/20
Retirement - KPERS 1 (PDF, 437KB)	8/19
Retirement - KPERS 2 (PDF, 533KB)	3/19
Retirement - KPERS 3 (PDF, 312KB)	3/19
Adjustments to Prior Contributions (PDF, 111KB)	6/19
Service Quarters known before as Period of Service (PDF, 201KB)	6/19
Pay Reporting (PDF, 144KB)	2/20

Helpful Resources

Contribution Information

[Employer Contribution Rates](#)

[What Compensation to Include in KPERS Contributions](#) (Feb 2020; PDF, 64KB)

[IRS Compensation Limits for KPERS Contributions](#) (Jan 2020; PDF, 63KB)

OGLI Rates

Optional Group Life Insurance Rates: [Membr](#)
[Spouse](#), [Child](#)

QDRO Guidelines

When Members Divorce [QDRO Guidelines/Forms](#)

KP&F Manual

[KP&F Employer Manual](#) Revised 2/20 (PDF, 729KB)

Employer Audits

[What is a KPERS audit?](#) (PDF, 95KB)

Helpful Resources

Quick Vids


Great source when using the Employer Web Portal



Employer Web Portal

Information and resources for the
best EWP experience.

Handouts

 Compensation to Include in Contributions	
Generally, withhold employee KPERS contributions from gross compensation before any deductions or reduce compensation means, except as otherwise provided, all salary, wages and other remuneration payable to an employee for services performed for the employer. But for a few exceptions, (e.g., long-term disability, some military contributions must be linked to actual participating service or paid leave. Contributions need to have service.	
Compensation Type	Include
Pay eligible for federal withholding	✓
Pay eligible for Social Security tax	✓
Pay eligible for Medicare tax	✓
Any pay sheltered for 403(b), 457 plans and 125 plans (flex spending accounts)	✓
Employer-paid service purchase	✓
Employer-paid moving expense reimbursement (effective July 1, 2019)	✓
Maintenance, board, lodging, tuition assistance, goods and services, and other allowances in lieu of money eligible for federal withholding	✓
Fringe benefits that are considered part of gross compensation unless they are specifically excluded from gross income by a section of the IRS code. Consult your fiscal or financial office or tax professional for guidance.	✓
(Hired before July 1, 1993)	
Any lump-sum payments for annual, vacation and sick leave.	✓
Any paid compensatory time	✓
Pay deducted for health insurance, even if pre-tax	✓
Cash in lieu of health insurance	✓
"Back" pay	✓
Bonus payment (e.g. incentive pay, longevity pay, Christmas bonus, performance bonus, etc. before termination)	✓
Value of health insurance paid by the employer	✓
Any amount not counted in final average salary at retirement	✓
Taxable amount of life insurance premium for coverage over \$50,000	✓
Reimbursement for actual expenses	✓
Early retirement incentive paid before retirement	✓
Membership date before July 1, 1996: Pay over \$425,000 for 2020	✓
Membership date on or after July 1, 1996: Pay over \$285,000 for 2020	✓
Severance pay*	✓
(Hired after July 1, 1993)	
Lump-sum payments for annual, vacation and sick leave	✓
Worker's compensation payments	✓
Short-term disability payments from 3rd party	✓

*Severance: Payment by an employer to an employee beyond his wages on termination of employment.

Enrollment for School Positions

Position	Description
Daily-Call Substitute	<ul style="list-style-type: none"> Can decide yes or no to work May work 630 hours or more per year but not required May be asked to substitute teach at different schools
Long-Term Sub Teacher	<ul style="list-style-type: none"> Hired to sub every day in same school district If hiring a KPERS retiree, working-after-retirement rules apply
Temporary Teacher	<ul style="list-style-type: none"> Hired for a period of time until regular teacher returns Temporary teacher does not meet membership requirements If regular teacher does not return, temporary teacher may be assigned as Replacement Teacher (see below) If hiring a KPERS retiree, working-after-retirement rules apply
Replacement Teacher	<ul style="list-style-type: none"> Can be hired and assigned to position if regular teacher can't complete school year Becomes KPERS member when permanently assigned to position If hiring a KPERS retiree, working-after-retirement rules apply
Concurrent Employment	<ul style="list-style-type: none"> Member that works for two or more school employers Positions don't stand alone as a KPERS-covered position Positions are not seasonal or temporary Combined 630 hours/school year or 3.5 hours/day for at least 180 days If hiring a KPERS retiree, working-after-retirement rules apply

7/19

The Employer Manual is your comprehensive resource for all things KPERS
Go to: kpers.org/employers/manual

2/20

Summer Pay for Retiring School Employees

CHEAT SHEET

Licensed positions on 12-month contracts

Contract End Date	Retirement Date	End Date	Report	Don't Report
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	July 31	All pay, including add-on*	n/a

Board of Ed Licensed Positions

- 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

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

If They...

- Work 9 or 10 months and receive pay over 12 months
- Work 9 or 10 months and receive pay over 9 or 10 months
- Work and receive pay over 12 months

End Date

- Last day of month before retirement date
- Actual last day worked
- Actual last day worked

Report

- All pay, including summer checks & add-on pay*
- All pay, including add-on pay*
- 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**

GO TO: kpers.org/employers

INFOLINE: 1-888-275-5737

EMAIL: employers@kpers.org

SUMMER PAY

3/19

Correct Errors for Pay Period Reporting



Errors on Enrollment Dates and End Dates

- Email employers@kpers.org.
- Send a detailed email regarding the change.

Department Change

- Send in a K12 form before Pay Period Report is generated.

Errors with Period of Service

- Before verifying Period of Service, compare with the calendar to make sure the pay dates are correct.
- Send in a new Period of Service chart if needed.

Correct Errors in Member Information

Member Information is Incorrect

- Send in a K12 form with supporting documents.

Member Changed their Name

- Send in a K12 form with supporting documents.



RESET

PRINT

REQUEST FOR MEMBER INFORMATION CHANGE

■ **Important** – Employers use this form to request a change or correction to a member's record. Please include a *copy* of the appropriate documentation that *reflects the new or corrected information* with this request form:

- **Name change:** Marriage certificate, divorce certificate, federal Employment Eligibility Verification form (I-9), drivers' license or Social Security card
- **Social Security number correction:** Social Security card or federal Employment Eligibility Verification form (I-9)
- **Date of birth correction:** Birth certificate or drivers' license

Pay Period Reporting – Can't Move Forward

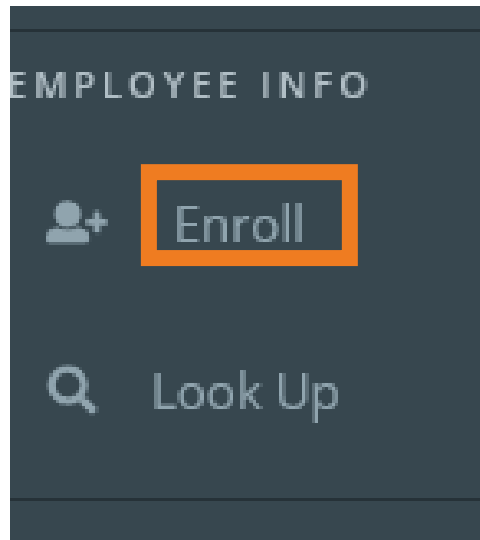
Income Dropped Below 50%?

- 1st pay period: Receive a message. Proceed as usual.
- 2nd pay period: Receive a warning. Put member on LOA if needed.
- Contact Fiscal Services to suppress the warning.

End Date Entered Incorrectly or Not at All?

- Enter end date in Employee page before pay period report is generated.
- Can be entered 90 days in advance.

Enroll WAR Member



Enter SSN

There is a match in our system for [redacted]




Retirement Date: 04/01/2015 YTD Compensation: \$26,174.06

Do you want to enroll?

☐ Yes ☐ No

- Check the EWP to see if the new hire is a WAR member.
- If no other retirees on payroll, KPERS might need to unsuspend account before enrollment can occur.

Who to Call

	 KPERS GENERAL QUESTIONS	 KPERS REPORTING & OGLI	 kpers457 ALL QUESTIONS
Toll-Free	1-888-275-5737	1-844-468-8929	1-800-232-0024 Say "yes" for KS office
Topeka	785-296-6166	785-268-6886	785-414-3600
Email	employers@kpers.org	kpersFS@kpers.org	kpers457@kpers.org
Fax	1-785-296-6638	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	800 SW Jackson St Suite 1108 Topeka, KS 66612
Web	kpers.org	kpers.org	kpers457.org

EWP Drive-Thru



Items on the Menu

- Homepage
- Employer Info page
- Employee page
- Death and Disability
- Adjustments
- Reports



Leaving Employment




Leaving Employment

- Termination
- Retirement
- Death
- Disability
- Move to Non-Covered
- Leave of Absence

Remember to enter an **End Date** when someone leaves employment.

Resource



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 KPER.* 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: KP&F members do not have basic life insurance coverage. KPER members moving to a Board of Regents position keep their life insurance coverage.



Important Points to Consider Now

- You have 60 days to submit your life insurance form.
- If you're vested, you're guaranteed a retirement benefit.

Reason Codes

- **Termination-** death, retirement, leaving employment
- **Non-Covered**
- **Military Leave-** military duty
- **Leave of Absence-** employee's health, family health, administrative

Leave of Absence – Employee’s Health

Situation	Employer Checklist
Member on leave of absence is earning less than 50% of full pay for 10 consecutive days .	<ul style="list-style-type: none"><input checked="" type="checkbox"/> Give member Leaving Employment flier<input checked="" type="checkbox"/> Give member Optional Life Insurance Continuation form (KPERS-79C)*<input checked="" type="checkbox"/> Login to EWP<input checked="" type="checkbox"/> Enter end date on employee’s record and select “Leave of Absence” as the reason Quick Vid: End Dates<input checked="" type="checkbox"/> Give member The Standard Group Conversion Packet and The Standard Life Portability Application to continue basic life coverage

Leave of Absence – Administrative

Member is on administrative leave of absence (paid or unpaid) **after 10 consecutive days.**



Give member [Leaving Employment flier](#)



Give member [The Standard Group Conversion Packet](#) and [The Standard Life Portability Application](#) to continue basic life coverage



[Login](#) to EWP



Enter end date on employee's record and select "Leave of Absence" as reason code [Quick Vid: End Dates](#)



Give member an Optional Life Insurance Continuation form ([KPERS-79C](#)).

Leave of Absence – Basic Life Insurance

Basic Life Insurance

Types of LOA	Coverage affected & employee options
Employee health	Covered for 180 days, paid from KPERS fund After 180 days, employee must convert or port to keep coverage
Military	Coverage continues during active military duty, paid from KPERS fund
All others	Coverage ends; employee must convert or port to keep coverage.
Return to work	Reinstated

What about a 9-month school schedule? Basic and optional coverage is continued during the summer months for school employees. Premium payments are deducted in advance for optional coverage.

KPERS 3



Retirement Eligibility

Normal Retirement (unreduced)

- Age 60 with 30 years
- Age 65 with 5 years

Early Retirement (reduced)

- Age 55 with 10 years



How KPERS 3 Works



Retirement Credits

- Credits earned quarterly based on **length of service**

Years Worked	Annual Rate
Less than 5	3%
5 – 11	4%
12 - 23	5%
24 or more	6%

- Represented as **dollar amounts**
- Build in value over time and **only available at retirement**

Retirement Calculations

- Employee's account balance (contribution account and retirement credit value)
- Actuarial factors
- Will receive a lifetime monthly benefit

Requires a different Retirement Application



Service Purchase

Types of Service	Years of Service	Rate (see table)	Purchase Cost	Monthly Benefit
KPERS 3	2.00 (have)	3%	-	\$486
Forfeited	14.25 (buying)	-	\$22,880	
Total	16.25	5%	\$22,880	\$541 (+\$55)

Years Worked	Annual Rate
Less than 5	3%
5-11	4%
12-23	5%
24 or more	6%

Would take **34 years** in retirement to break even

Service purchase usually **not beneficial** to KPERS 3

How KPERS 3 Works

Welcome!

for KPERS 3 Members

Retirement



Retirement Trivia

1. Which KPERS tier or tiers can retire at any age with 85 points? **KPERS 1**
2. In which KPERS tier is the amount in the contribution account used in calculating the benefit? **KPERS 3**
3. Which KPERS tier has their own special retirement application? **KPERS 3**
4. Which KPERS tier or tiers can retire at age 65 with at least 5 years of service? **All**



Retirement Date

Help employees choose the best retirement date.

- Rounding quarters
- Using add-on pay
- Completing estimates



Rounding Quarters

To determine when someone will round up to an additional year of service, it is important to determine the rounding quarter.

Use the Total Years in the Service Credit Section of the Member Annual Statement.

Service Credit

Total Years
17.25

This person rounds in the first quarter.

Rounding Quarters

.25 = Q1

.50 = Q4

.75 = Q3

.00 = Q2

Add-On pay

When able to use Add-On pay, it's best for retiree to work ...

- One day into quarter, then stop working or
- Work entire quarter, then stop working

<u>Year</u>	<u>Q1 Begin Date</u>	<u>Q1 End Date</u>	<u>Q2 Begin Date</u>	<u>Q2 End Date</u>	<u>Q3 Begin Date</u>	<u>Q3 End Date</u>	<u>Q4 Begin Date</u>	<u>Q4 End Date</u>
2019	12/23/2018	03/16/2019	03/17/2019	06/22/2019	06/23/2019	09/14/2019	09/15/2019	12/21/2019

First quarter rounders should work until the end of the first quarter.

Estimates

Two ways to calculate an estimate

No Add-Ons

- Preferred method is the Member Web Portal

With Add-Ons

- 15E Benefit Estimate Request

Member Web Portal



Kansas Public Employees Retirement System



[Why do I have to enroll?](#)

[How are you protecting my information?](#)

[Contact us](#)

[Privacy Policy & Disclaimer](#) | KPERS © 2008

New User

[What you'll need to enroll](#)

User ID

Login

[Forgot User Id](#)

Member Web Portal Benefit Calculator

Your Homepage

Select an Account					
Account	Relationship	Account Status	Account Balance	Service Credit	Membership Date
KPERS	Member	Active	\$75,356.47	26 years	02/18/1994

Click account link above to enter your account.

▶ Home

▶ Personal Profile

▶ Beneficiaries

▶ Seminar Registration

KPERS Account

▶ Account Summary

▶ Insurance/Disability

▶ **Benefit Calculator**

▶ Annual Statements

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Service Credit			
Type		Multiplier	
Earned	25.00 years	Service @ 1.75%	20.75 years
Purchased	1.00 years	Service @ 1.85%	5.25 years
Total Service Credit	26.00 years	Total Service Credit	26.00 years

Other Details	
Coverage Group	Final Average Salary
KPERS 1	\$66,882.61

Benefit Estimate Request – Non School

Best practice:

- If member's start date is **before July 1, 1993**, then fill out **two** – one working one day into quarter and one working entire quarter


KPERS-15E Rev. 12/17

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PRINT

RETIREMENT BENEFIT ESTIMATE REQUEST
For security reasons, do not submit form by email.

■ **Important** – A member or a designated agent may complete this form. Only one needs to sign. *Please keep in mind that the benefit estimate calculated from this information is just an estimate. This estimate may take up to 4 weeks to process. Actual retirement benefits will be based on information the employer provides when a member actually retires.*
Members can calculate their own benefit estimate by logging in to their personal account at kpers.org. The benefit calculator uses a member's personal data to create quick, accurate estimates.

■ **Contact Us** – toll free: 1-888-275-5737 • phone: 785-296-6166 • fax: 785-296-6638
email: kperse@kpers.org • web site: kpers.org • mail: 611 S. Kansas Ave., Suite 100, Topeka, KS 66603

■ **Part A – Member Information**

1. Social Security Number: _____	2. Name (First, MI, Last): _____
3. Mailing Address: _____	4. Employer: _____
City, State, Zip: _____	5. Position: _____
6. Expected Retirement Date: _____	7. Expected Last Day on Payroll: _____
8. Is Member Subject to Continuing Contract Law? <input type="checkbox"/> No <input type="checkbox"/> Yes; Date Contract Expires: _____	
9. Daytime Telephone Number: _____	10. E-mail Address: _____

■ **Part B – Joint Annuitant Information** – To have joint-survivor options estimated, complete the information below for the person you want as your joint annuitant.

1. Name (First, MI, Last): _____	2. Date of Birth: _____
----------------------------------	-------------------------

■ **Part C – KPERS 3 Pay Information**

1. Current Annual Salary Subject to KPERS Contributions:	\$ _____
--	----------

■ **Part D – KPERS 1, KPERS 2, KP&F and Judges Pay Information**

Important: Do not include any incentive pay or additional compensation for unused sick or annual leave in amounts listed in 1-2 below.

	Year	Amount
1. Current Annual Salary Subject to KPERS Contributions: <i>If retiring in current year, include only compensation through estimated last day on payroll.</i>	_____	\$ _____
2. Next Annual Salary Subject to KPERS Contributions: <i>If retiring in next year, include only compensation through estimated last day on payroll.</i>	_____	\$ _____
3. Lump-Sum Payment for Sick and/or Annual Leave: <i>Paid when member leaves work, not included in above salaries.</i>	_____	\$ _____

"I certify that the information provided on this form is true to the best of my knowledge. I understand that the retirement estimate calculated with this information is just an estimate. KPERS will calculate the actual benefit at retirement using verified final amounts and pay the benefit according to applicable laws and regulations."


Member Signature: _____ Month/Day/Year: ____/____/____

Designated Agent Signature: _____ Month/Day/Year: ____/____/____

Benefit Estimate Request – School

Best practice:

- In general, those under the “Continuing Contract Law”, will have **June 1** retirement date – **Go to the Member Web Portal.**
- If member’s start date is before July 1, 1993, then fill out **two** 15E forms– one for a **June 1** retirement date and one for the first retirement date after the end of their contract.


KPERS-15E Rev. 12/17

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RETIREMENT BENEFIT ESTIMATE REQUEST
For security reasons, do not submit form by email.

■ **Important** – A member or a designated agent may complete this form. Only one needs to sign. *Please keep in mind that the benefit estimate calculated from this information is just an estimate. This estimate may take up to 4 weeks to process. Actual retirement benefits will be based on information the employer provides when a member actually retires.*
Members can calculate their own benefit estimate by logging in to their personal account at kpers.org. The benefit calculator uses a member's personal data to create quick, accurate estimates.

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email: kpers@kpers.org • web site: kpers.org • mail: 611 S. Kansas Ave., Suite 100, Topeka, KS 66603

■ **Part A – Member Information**

1. Social Security Number: _____	2. Name (First, MI, Last): _____
3. Mailing Address: _____	4. Employer: _____
City, State, Zip: _____	5. Position: _____
6. Expected Retirement Date: _____	7. Expected Last Day on Payroll: _____
8. Is Member Subject to Continuing Contract Law? <input type="checkbox"/> No	<input type="checkbox"/> Yes; Date Contract Expires: _____
9. Daytime Telephone Number: _____	10. E-mail Address: _____

■ **Part B – Joint Annuitant Information** – To have joint-survivor options estimated, complete the information below for the person you want as your joint annuitant.

1. Name (First, MI, Last): _____	2. Date of Birth: _____
----------------------------------	-------------------------

■ **Part C – KPERS 3 Pay Information**

1. Current Annual Salary Subject to KPERS Contributions: \$ _____

■ **Part D – KPERS 1, KPERS 2, KP&F and Judges Pay Information**

Important: Do not include any incentive pay or additional compensation for unused sick or annual leave in amounts listed in 1-2 below.

	Year	Amount
1. Current Annual Salary Subject to KPERS Contributions: <i>If retiring in current year, include only compensation through estimated last day on payroll.</i>	_____	\$ _____
2. Next Annual Salary Subject to KPERS Contributions: <i>If retiring in next year, include only compensation through estimated last day on payroll.</i>	_____	\$ _____
3. Lump-Sum Payment for Sick and/or Annual Leave: <i>Paid when member leaves work, not included in above salaries.</i>	_____	\$ _____

"I certify that the information provided on this form is true to the best of my knowledge. I understand that the retirement estimate calculated with this information is just an estimate. KPERS will calculate the actual benefit at retirement using verified final amounts and pay the benefit according to applicable laws and regulations."

Member Signature: _____ Month/Day/Year: ____/____/____
Designated Agent Signature: _____ Month/Day/Year: ____/____/____

Benefit Estimate Request

■ Part C – KPERS 3 Pay Information

1. Current Annual Salary Subject to KPERS Contributions:

\$

■ Part D – KPERS 1, KPERS 2, KP&F and Judges Pay Information

Important: Do not include any incentive pay or additional compensation for unused sick or annual leave in amounts listed in 1-2 below.

1. Current Annual Salary Subject to KPERS Contributions:
If retiring in current year, include only compensation through estimated last day on payroll.

Year

Amount

\$

2. Next Annual Salary Subject to KPERS Contributions:
If retiring in next year, include only compensation through estimated last day on payroll.

\$

3. Lump-Sum Payment for Sick and/or Annual Leave:
Paid when member leaves work, not included in above salaries.

\$

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



Certification

- Retirement

The screenshot displays a software interface with a dark sidebar on the left and a main content area on the right. The sidebar contains a menu with 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 to the 'Certification' item. The main content area has a blue header labeled 'To Do' and a list of tasks: 'Pay Reports (3)', 'Retirement Certification (4)', and 'Verify Rates (1)'. An orange arrow points from the right towards the 'Retirement Certification (4)' task.

Menu Item	To Do Item
Adjustment	Pay Reports (3)
MISC	Retirement Certification (4)
Invoices	Verify Rates (1)
Certification	

Certification Checklist – Non-School

- Verify the last day on payroll is the last day member earned compensation.
- Use comment box anytime there is a discrepancy in pay. (bonuses, reduced hours, mileage reimbursement, cell phone reimbursement etc.)
- Report Add-On Pay only for members hired PRIOR to July 1, 1993 or in Year of Service. Report sick leave payout, vacation leave payout, and overtime payout separately.

Certification Checklist-School

Verify the last day on payroll is the last day member earned compensation.

- Licensed employees will be the last day of the month
- Classified employees will be the last day earning compensation

Position at retirement and school questions **must** be answered.

Verify Contract End Date is Correct

- Licensed employees will be last day of contract
- Classified employees leave blank or use last day of earned compensation

Certification Checklist-School

- Use comment box anytime there is a discrepancy in pay. (bonuses, reduced hours, mileage reimbursement, cell phone reimbursement etc.)
- Report Add-On Pay only for members hired PRIOR to July 1, 1993 or in Year of Service. Report sick leave payout, vacation leave payout, and Comp payout separately.

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.
- Please add detailed comments if using "Other."

Step 1
EE Information

Step 2
Pay Information

Step 3
Add On Pay

+ New Delete

	Add On Amt	Add On Type	Year	Comments
<input type="checkbox"/>	\$185.00	Sick Leave Payment	2018	

Message ID Message Severity

No records to display.

Back Next

Annual Leave/Vacation Payment
Comp Time Payment
Other
Sick Leave Payment

Pre-Retirement Webinars

Spread the Word!

- Forward emails to all employees
- Send out reminders



Training



Educational Opportunities

To arrange educational opportunities, email employers@kpers.org

- **Presentations and Webinars**
 - Basic KPERS 1,2, & 3
 - New Employees KPERS 3
 - Pre-Retirement
- **Benefit Fairs**
- **One-on-One** Counseling
 - Employees
 - New Designated Agent

Educational Opportunities

When contacting KPERS via email for training, please list:

- Date
- Type of presentation
- Length
- Presentation platform

Optional Group Life Insurance for Active Members

- Employers can affiliate for Optional Group Life Insurance. Contact KPERS to find out more.
- If affiliated, contact KPERS or The Standard with questions

Office 800 SW Jackson St., Ste. 1110
Topeka, KS 66612

Phone 1-844-289-2306

Fax 971-321-5033

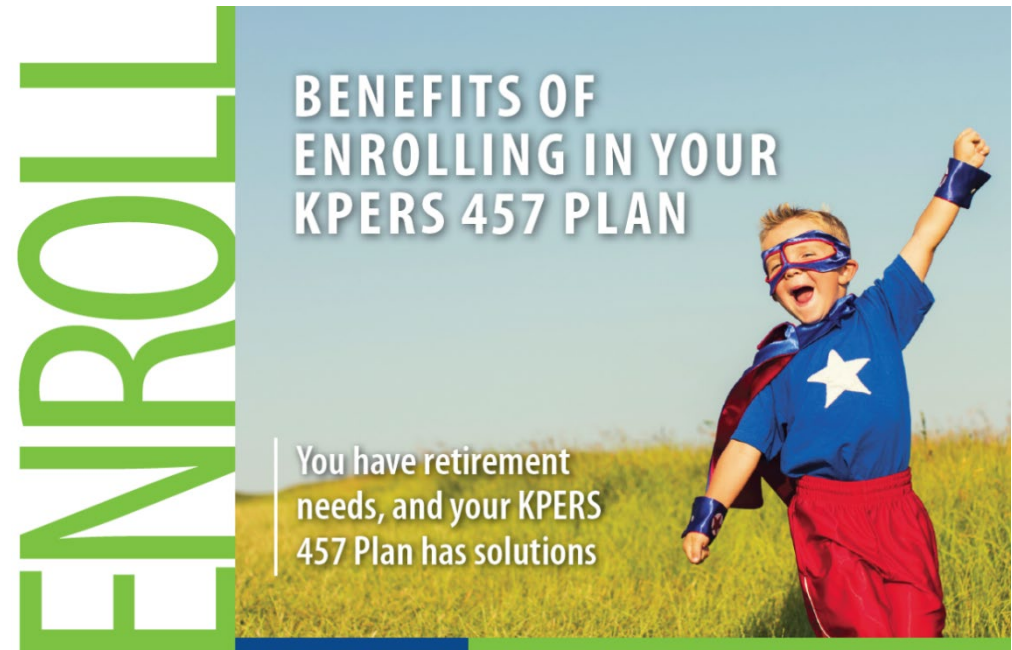
Email kpersadmin@standard.com



KPERS 457 Affiliates

- Hand out KPERS 457 flyer
- Direct employee to website to enroll:

www.kpers.org/kpers457





Thank You!

