Retirement Offboarding

Once you have decided to retire from your Parkland career, you'll need to take several steps to ensure a proper transition. Below you will find offboarding information and key steps to assist in your retirement process.

Discuss your plans with your Supervisor:

1. Make sure to discuss your plans with your immediate manager. You will want to discuss your decision and finalize a last day of employment.
2. Turn in your official resignation to your supervisor with at least a 2-week last day notification if possible.

Parkland requests the following notice period:

1. Employees are requested to provide at least two weeks' notice prior to the last day that work is to be performed.
2. Executive Staff, Senior Vice Presidents, Vice Presidents, Department Directors, and equivalent ranked staff are requested to provide at least four weeks' notice prior to the last day that work is to be performed.
3. Physicians, Advanced Practice Providers (APP) (i.e., Physician Assistants, Advanced Practice Nurses, Certified Nurse Midwives, and Certified Registered Nurse Anesthetists (CRNA)) are requested to provide at least six weeks' notice prior to the last day that work is to be performed.

Working the entire notice period is required.

1. Unless time off is given for Hospital observed holidays, jury duty or bereavement time.
2. PTO should not be used a part of the notice period.
3. Any PTO requested during the notice period may be approved at the manager's discretion. PTO should not be used for vacation time during the notice period.

Voluntary Resignation Form

1. Employees must complete the Voluntary Resignation form found in the OTM Portal within 24 hours of notice of resignation to their leader.
2. During completion of the Voluntary Resignation form, employees will be given an opportunity to complete an optional Exit Survey. If employees choose to complete a survey, he/she is encouraged to be honest, candid, and constructive in their responses. The Exit Survey responses will only be provided to the Talent Management Business Partner (TM Business Partner).
3. Employees will receive a confirmation email upon electronic submission of the Voluntary Resignation form.
4. After submission of the Voluntary Resignation form, the employee's leader will receive a notification to acknowledge the employee's resignation. The leader will have 48 hours to acknowledge. If not acknowledged by the leader within 48 hours, an email will be escalated to the next level of leadership.
5. The Talent Management Business Partner will also receive a notification that the employee has submitted the Voluntary Resignation form. Once received OTM Shared Services will complete the termination process.

Voluntary Resignation Form submitted on behalf of employee:

1. If an employee is unable to complete the Voluntary Resignation Form, the employee's leader must complete the form on behalf of the employee due to one of the following circumstances:
    a) Employee is out of office and has decided not to return
    b) Employee has already left the organization
    c) Death of Employee
    d) Job Abandonment
    e) Any other reason is to be further discussed with TM Business Partner prior to submitting the Voluntary Resignation Form.

2. Upon submission of the Voluntary Resignation Form OTM Shared Services will complete the termination process.
3. If a Voluntary Resignation Form is submitted after the employee's last day of employment, the leader and leaders' next level of leadership will receive a notification email detailing the consequences of submitting a retroactive termination.

Effective Date:

1. The effective date of a voluntary termination is the last day of employment (for overnight staff, it is the day the shift ends).
2. The effective date of an involuntary termination will be the date of conference that is indicated on the Progressive Discipline Report.
3. Termination benefits will be computed though the last day of employment for voluntary and involuntary terminations.
4. If employee termination is due to a department reorganization/staff reduction, and the employee is eligible for and has met the requirements for severance, the employee will be designated as "terminated with pay" during the relevant severance period, and the effective date of the employee's termination will be the last day of the severance period.
5. If the employee is unable to return from a leave of absence, the leader must confer with their TM Business Partner for guidance.

Benefits After Separation:

<u>Parkland Supplemental Savings Plan and Mandatory Savings Plan (If Applicable)</u>

Your normal contributions will continue until the pay period end date following your last day of employment. You may contact Milliman @ 1-800—995-2608 to receive a distribution packet mailed to your home address. The distribution packet will contain general information and the necessary forms required for a lump sum rollover or cash distribution.

Options at termination:

1) Roll vested balance and employee contributions to a new employer-sponsored plan. The new employer-sponsored plan must be willing to accept the assets.

2) Roll vested balance and employee contributions to an Individual Retirement Account.
3) Take a cash distribution. IRS tax laws apply.
4) Leave money in the Supplemental Savings Plan and the Mandatory Savings Plan (if applicable) at Milliman. (Balances greater than $5,000.00)

Steps to complete before last day of employment.

1. The steps included the following but are not limited to the return of ID badge, keys, equipment, and devices.

a) ID Badge

- Police Department/Badge Office (Wayfinding 01-945) located on the first floor of the Logistics Building located at 5223 Tex Oak Avenue (directly behind New Parkland)
- Office Hours: Monday, 1p.m. – 4:30p.m.; Tuesday – Friday, 7a.m. – 4:30p.m.
- For questions, please call (469) 419-7275 (extension 7-7275)

b) Parkland Keys

- Engineering Department/Facilities Support Office (Wayfinding 02-902) located on Services the second floor of the Logistics Building located at 5223 Tex Oak Avenue (directly behind New Parkland)
- Office Hours: Monday – Friday, 8a.m. – 4:30p.m.
- For questions, please call (214) -590-8261 (extension 2-8261)

c) Equipment and Devices

- Parkland-issued beepers and cellular telephones are to be returned to Telecommunications within

the timeframes outlined in Administrative Fiscal Policy #8311-3-18.

d) EPIC Access

- Any employees with EPIC Access must address all messages and remove any Basket Pools before departure from Parkland; contact PMHHIMExitSurvey@phhs.org for assistance. Any messages remaining after the employee's departure will be your responsibility to address.

e) Exit Survey

f) Retirement benefits

g) Repayment of monies owed to Parkland for early termination of employment-related incentive agreement(s).

Contact the Milliman Benefits Service Center at 1-800-995-2608 with questions regarding the Supplemental Savings Plan and the Mandatory Savings Plan (if applicable).

Parkland Retirement Income Plan (Pension Plan)

If eligible, your normal contributions will continue until the pay period end date following your last day of employment. (Employees who were working on or before Dec. 12, 2023, and did not change their employment status or stop working at Parkland are eligible for the Pension Plan.)

Vested

(At least five (5) years of full-time service with Parkland Health).
If you have at least five (5) years of full-time service with Parkland Health, you are eligible to receive a monthly pension benefit at retirement. You may elect to commence payment of your monthly pension benefit as early as age fifty-five (55). Normal Retirement Age under the plan is age sixty-five (65).

Non-Vested
If you have less than five (5) years of full-time service with Parkland Health, you are entitled to receive a refund of your mandatory contributions into the Retirement Income Plan.

Part-Time Employees
Your normal contributions will continue until the pay period end date following your last day of employment. Starting in 2024, your mandatory retirement plan contributions as a part-time employee are deposited into Parkland's Mandatory Savings Plan. Any part-time mandatory contributions made before 2024 are held in your part-time mandatory contributions account in the Supplemental Savings Plan. Please refer to the section above titled Parkland Supplemental Savings Plan for information regarding your options.

Contact the Milliman Benefits Service Center at 1-800-995-2608 with questions regarding the Parkland retirement benefits program.

Medical Insurance

If you are currently covered on the Parkland Employee Health Plan and were covered, without a break in coverage, before August 1998, then your coverage will end the last day of the month following your last day of employment. If you are currently participating in the plan and enrolled after August 1998, your coverage will continue until the pay period end date following your last day of employment. You will have the option to elect continued medical insurance coverage under the Parkland Employee Health Plan (on a COBRA basis) for an additional eighteen (18) months. You must be currently enrolled in the health plan to be eligible for COBRA. You will have 60 days from the day you lose coverage as an active employee to elect COBRA. The COBRA administrator (Cushion Employer Services) will automatically mail the COBRA enrollment information to your home address within two weeks after your last day of employment. For questions regarding the COBRA Health Insurance Coverage, see contact information on page 9.

Dental Insurance

If you are currently enrolled in the dental insurance plan, your coverage will continue until the pay period end date following your last day of employment. You will have the option to elect COBRA dental insurance coverage for an additional eighteen (18) months. You must be currently enrolled in the dental plan to be eligible for COBRA. You will have 60 days to elect continuation of coverage. The COBRA administrator will automatically mail the COBRA enrollment information to your home address within two weeks after your last day of employment. To obtain coverage details and premiums, see contact information on page 9.

Vision Insurance

If you are currently enrolled in the vision insurance plan, your coverage will continue until the pay period end date following your last day of employment. You will have the option to elect COBRA dental insurance coverage for an additional eighteen (18) months. You must be currently enrolled in the dental plan to be eligible for COBRA. You will have 60 days to elect continuation of coverage. The COBRA administrator will automatically mail the COBRA vision insurance coverage information to your home address within two weeks after your last day of employment. To obtain coverage details and premiums, see contact information on page 9.

Disability Insurance

You will have the option to continue Disability Insurance upon termination of employment.

An employee is eligible to participate in Continuation of the group Disability Plan on the day of termination provided the employee has completed at least five (5) years of continuous service with Parkland Health and is under the age of sixty-five (65). You must apply for participation within thirty-one (31) days after your last day of employment. Participants will be required to pay a monthly premium for the coverage. If you are eligible to continue Disability Insurance, the election form will be included in the packet of information that you receive from Cushion Employer Services.

Basic Life Insurance

Your life insurance coverage will continue until your last day of employment. You will have the option to convert your Basic Life Insurance coverage to an individual policy. Securian Financial will mail you a continuation packet containing information on your portability and/or conversion rights. You must complete and submit your request to the life insurance carrier within 31 days of your last day of work. Contact Securian Financial at 1-866-293-6047 with questions regarding the conversion of the Basic Life Insurance policy.

Supplemental Life Insurance

If you are currently enrolled in the Supplemental Life Insurance plan, then your life insurance coverage will continue until your last day of employment. You will have the option to convert your Supplemental Life Insurance coverage to an individual policy. Securian Financial will mail you a continuation packet containing information on your portability and/or conversion rights. You must complete and submit your request to the life insurance carrier within 31 days of your last day of work. Please contact Securian Financial at 1-866-293-6047 with questions regarding the conversion of the Supplemental Life Insurance policy.

Flexible Spending Account

If you are currently participating in the Flexible Spending Account program, your coverage will terminate on your last day of employment. Inspira will not process reimbursement requests for services rendered after this day. Please contact Inspira at 1-800-284-4885 with specific questions or concerns.

Employee Assistance Program

The services of the Employee Assistance Program will be available to you for up to 6 months after your last day of employment. Please contact the Cigna EAP at 1-800-247-4433 with specific questions or concerns.

Paid Time Off

You will receive compensation for any unused PTO time that you have earned up to your last day of employment.

Benefits Resources List

For specific questions or concerns, please contact the designated contact listed below:

Resource	Phone
Cobra Administration: Medical, Dental, Vision, FSA Cushion Employer Services	**1-866-218-0614**
Medical: Disability Continuation Cushion Employer Services	**1-866-218-0614**
Cigna: Medical Claims, Providers	**1-800-247-4433**
Cigna: Prescriptions, Pharmacies	**1-800-247-4433**
Cigna Dental PPO: Dental PPO Claims, Providers	**1-800-247-4433**
Cigna Dental HMO: Dental HMO Claims, Providers	**1-800-247-4433**
Superior Vision by MetLife: Vision Claims, Providers	**1-800-507-3800**
Inspira: Flexible Spending Account (FSA)	**1-800-284-4885**
Securian Financial/Minnesota Life: Basic and Supplemental Life Insurance	**1-866-293-6047**
Milliman: Retirement Income Plan Mandatory Savings Plan Supplemental Savings Plan	**1-800-995-2608**
Cigna EAP Counseling Services	**1-800-247-4433**
Group One: Employment Verification	**972-719-4208 or** **469-648-5052**
Parkland OTM Shared Services: General Benefits Questions	**469-419-3000** **(ext. 7-3000)**

Retirement Offboarding Checklist

Discuss Plans with Supervisor	
Give formal notice	
Complete Resignation Form	
Return badge, keys and all Parkland equipment	
Complete exit survey	
Discuss retirement benefits	
Repayment of any funds due to Parkland	
Contact Milliman to discuss retirement account	

After Retirement from Parkland:

Now that you're retiring, join the Parkland Retirement Organization (PROs') and stay in touch with your retired Parkland friends. The PROs' is the only organized group for retired Parkland employees. See attached flyer for more information.

Parkland Retirees Organization

We're the PROs'! Come Join Us!

The Parkland Retirees Organization (PROs') is the only organized group for retired Parkland employees. Now that you're retiring, we're inviting you to join us and stay in touch with your retired Parkland friends.

PROs' Background:
In August 2003, retirees Katie Huber and Anna Robinson brought together over 50 former Parkland employees. From that gathering, the PROs' were formed and has continued to grow. PROs' members are from all departments of the hospital. We get together for fellowship and to gain information regarding retirement and Parkland activities.

PROs' Purposes Include:

- To rekindle Parkland friendships
- To stay informed on retirees' benefits
- To volunteer and support the hospital
- To benefit the Parkland Foundation
- To gain knowledge on Parkland's future

Membership:
The only requirement for PROs' membership is that you are receiving (or eligible to receive) benefits from Parkland. Membership dues are only $15 per year which gives you access to the PROs' website and provides you with a directory of fellow PROs' members. Membership meetings are held twice a year at a central Dallas location and may involve an additional minimal expense to cover the cost of your lunch.

ParklandPros.org:
Use this form and send the check to our treasurer who is listed on the website. The treasurer is listed under the membership tab; click "here" for the treasurer's name and address or use the membership form from the website.

Allstate Health Solutions (formerly VelaPoint) for Retirees

Allstate Health Solutions gives Parkland retirees a resouce to purchase benefits outside of Parkland Health.

Visit parklandretire.allstatehealth.com to get competitive quotes for health, dental and vision, supplemental insurance (critical illness and accident insurance), home, auto and life insurance.

Questions? Call 855-909-0181 to speak with a designated Parkland retiree specialist.