



United States
Office of Personnel Management
Retirement and Insurance Service

Benefits Administration Letter

Number: 98-113

Date: October 5, 1998

Subject: Reporting Requirements for the Federal Employees Retirement System (FERS) Open Season

In Benefits Administration Letter (BAL) 98-109, we said that we would publish the requirements for agencies to report on the implementation and outcome of the FERS open season in a separate BAL. The attachment to this letter provides those reporting requirements. In keeping with our goal to make the administration of the FERS open season as efficient as possible, the Government-wide reporting requirements are minimal and focus on outcomes. We have also included five optional questions, including several about the products and services we provided to support the open season. We hope you will respond to these items because the information requested will help us assess the effectiveness of our efforts.

We ask that all reports on the open season be consolidated at the Department or Independent Agency level and submitted to the Associate Director for Retirement and Insurance by February 28, 1999. The mailing address is:

U.S. Office of Personnel Management
Agency Services Division
P.O. Box 57
Washington, DC 20044

Reports also may be faxed to (202) 606-1108 or emailed to asd@opm.gov.

We have received a number of requests for current transfer information. We are contacting benefits officers from the large agency group by phone to ask for overall transfer rates as of the end of the last pay period ending in FY98.

**Civil Service
Retirement
System**

**Federal Employees
Group Life
Insurance**

**Federal Employees
Health Benefits
Program**

**Federal Employees
Retirement
System**

Correction on Sick Leave Recording:

In BAL 98-109, the section on "Processing the Transfer Personnel Actions," among other things, required that the employee's sick leave balance as of the day before the effective date of transfer be entered in the remarks section of the SF-50 that documents the transfer to FERS. The BAL stated that the sick leave balance should be entered in years and months. This is incorrect. As provided in standing instructions in Chapter 81 of the *CSRS and FERS Handbook for Personnel and Payroll Offices*, the sick leave balance should be entered in hours, e.g., "804 hours of sick leave as of July 4, 1998." We apologize for the confusion this may have created.



Agency Services Division
Retirement and Insurance Service

Attachment

Attachment to BAL98-113

Agency Reports on Results of FERS Open Season

Please respond to items 1-6. Responses to items 7-12 are optional. However, your responses to these items will be helpful to us.

1. If you do not report to the Central Personnel Data File, complete the following:

Retirement Category	Number Eligible to Elect FERS	Number Who Elected FERS
Regular formula		
Law enforcement/firefighter		
Air traffic controller		
Congressional employee		
CSRS Offset-- Regular formula		
CSRS Offset--Law enforcement/firefighter		
CSRS Offset--Air traffic controller		
CSRS Offset--Congressional employee		
Other		

2. Were employees notified of the open season and of the availability of the Transfer Handbook, the Transfer Model (or similar product), and the availability of assistance by June 15, 1998?

Yes No. They were notified by _____.

3. How did you make the Transfer Handbook available to employees? (Check all that apply.)

Individual paper copies LAN Internet Other (Please describe)

4. How did you make the FERS Transfer Model available to employees? (Check all that apply.)

Intranet Internet Individual requests for estimates Other (Please describe)

5. Did you use the sample employee letter in Benefits Administration Letter 98-110 (or a similar letter) to make employees more aware of the interrelationship between Social Security and civil service retirement benefits?

Yes No

Questions 6-11 are optional.

6. Describe any other significant actions your agency took to disseminate information on the open season to your eligible employees, such as briefings, employee letters, email, Internet, LAN's, WAN's, etc.

7. Did you use contractor assistance to augment your own resources to do briefings, counseling, or projections?

* Briefings Yes No

* Counseling Yes No

* Projections Yes No

8. Were the satellite broadcasts (or tapes of the broadcasts) that we presented a useful means of communicating information to staff who were responsible for handling the open season and to employees?

Yes No

9. Rate, on a scale of 1 (least) to 10 (most), the utility to your agency of the

* FERS Transfer Handbook_____

* FERS Transfer Model_____

* FERS Election Opportunities web site_____

* Satellite broadcasts and/or tapes of the broadcasts_____

10. Is there anything we did not do that really would have helped your agency and that should be considered in any similar future activity?

11. For the ongoing FERS election opportunities that returning employees have, is there any additional product that OPM should sponsor that would significantly help you carry out your responsibilities?

Agency Name _____

Name and Title of Person Submitting Report _____

Date _____