



APPLICATION TO MAKE SERVICE CREDIT PAYMENT FOR CIVILIAN SERVICE FEDERAL EMPLOYEES RETIREMENT SYSTEM

TO AVOID DELAY IN PROCESSING:

1. Read the attached information carefully.
2. Typewrite or print in ink.
3. Complete Part A in full. If you are currently a Federal employee, have your employing agency complete Part B.

A. TO BE COMPLETED BY THE APPLICANT

1. Name (<i>Last, first, middle</i>)		2. List other names you have used		3. Birthdate (<i>mo,dy,yr</i>)	
4. Address (<i>Number and street</i>)		5. Department or agency in which presently or last employed, including bureau, branch, or division		6. Social Security Number	
<i>(City, State, and ZIP Code)</i>		7. Location of employment (<i>city and state</i>)		8. Title of position	
9. Have you previously filed any application under the Federal Employees Retirement System (FERS) or the Civil Service Retirement System (CSRS)?		<input type="checkbox"/> Yes (Complete items 9a and 9b.) → <input type="checkbox"/> No		9a. Type of application <input type="checkbox"/> Service credit payment <input type="checkbox"/> Refund <input type="checkbox"/> Return of excess deductions <input type="checkbox"/> Retirement	
				9b. Claim number(s) (If available)	
10. List below in chronological order all periods of Federal civilian service. Be sure all your service is listed so that the Office of Personnel Management (OPM) can bill you for the correct amount.					
Department or Agency, including bureau, branch or division, where employed	Location of Employment (<i>city and state</i>)	Title of Position	Periods of Service		Check whether deductions were not withheld, withheld and refunded, or withheld and remain to your credit
			Beginning Date	Ending Date	Not Withheld
11. Are deductions for the Federal Employees Retirement System now being withheld from your salary?			12. If your answer is "No," give the date of separation from your last position under the Federal Employees Retirement System →		Date of separation
<input type="checkbox"/> Yes <input type="checkbox"/> No					
13. Signature of applicant			14. Telephone number (Including area code) where you can be reached during the day		15. Date

B. TO BE COMPLETED BY THE EMPLOYING AGENCY

INSTRUCTIONS TO THE AGENCY - Do not use this application to verify service for leave, retention or other non-retirement purposes. The procedures for verifying service for nonretirement purposes or for establishing creditability of service are contained in the Federal Personnel Manual. If more space is needed for the information requested in item 4, please attach a separate sheet. Show the name and Social Security number of the applicant on the separate sheet (SF 3107-1 may be used for this purpose).

<p>1. Is the employee covered by the Federal Employees Retirement System (FERS)?</p> <input type="checkbox"/> No <input type="checkbox"/> Yes →	<p>2. Provide exact date FERS deductions began for the current appointment. (May be before January 1, 1987, if employee was automatically covered by FERS or all of a transferee's service will be credited under FERS rules.)</p>
<p>3a. Did this employee elect to transfer to FERS? Effective date of election</p> <input type="checkbox"/> No <input type="checkbox"/> Yes → _____	<p>3b. If yes, is this employee entitled, according to your records, to have part of his/her future retirement annuity computed under CSRS rules?</p> <input type="checkbox"/> No <input type="checkbox"/> Yes

4. CIVILIAN SERVICE NOT UNDER FERS OR CSRS
 From verified service documented in official personnel records, list any Federal civilian or District of Columbia Government service not covered by FERS or CSRS deductions which you believe is potentially creditable. If a period of service was subject to another retirement system for Federal employees, note this in the "Leave Without Pay" column. If total salary earned for such period of service is known, a summary entry may be entered on the right-hand side below. Otherwise, show each change affecting basic salary during the period of service. List any period of nondeduction service claimed on the front of this form which cannot be verified from official records and note it in the "Leave Without Pay" column as "Unverified." Service which was not subject to FERS or CSRS deductions is creditable only as specifically allowed by law. **NOTE:** This information will also be requested on the SF 3107-1 in connection with the employee's retirement. File a copy of this schedule on the right side of the Official Personnel Folder to facilitate completion of the SF 3107-1.

Nature of Action <i>(Appt., pro., res., etc.)</i>	Effective Date <i>(Mo., Day, Year)</i>	Basic Salary Rate	Salary Basis <i>(Per annum, per hour, WAE, etc.)*</i>	Leave Without Pay	If Basic Salary actually earned is available make summary entry below		
					From <i>(Mo., Day, Year)</i>	To <i>(Mo., Day, Year)</i>	Total Earned

Comments _____

* If part-time, provide the number of hours in the scheduled tour of duty and dates of each change in tour of duty. If employee claims to have worked more than the scheduled tour(s) provide number of hours worked at each pay rate. If intermittent (WAE), provide the number of hours worked, if available, at each pay rate.

Certification - The information entered above is based on official records of this agency and is correct. There is no official personnel or fiscal record in this agency of the additional service (if any) alleged by the employee and marked "Unverified" in item 4.

Agency address	Signature	Date
	Official title	Telephone number

INFORMATION REGARDING SERVICE CREDIT PAYMENTS FOR CIVILIAN SERVICE FEDERAL EMPLOYEES RETIREMENT SYSTEM (FERS)

(Detach this sheet before filling out the application and save this information for your records.)

Read this information carefully before filling out the attached application.

Who Should Use This Application?

You should use this application if you are covered by the Federal Employees Retirement System (FERS) and you want to pay for civilian service so that you can receive retirement credit for the service. You should also use this application if you transferred to FERS and want to pay for service which will be credited under Civil Service Retirement System (CSRS) rules.

If you are under the Civil Service Retirement System, use Standard Form 2803, which is available from your personnel office, to apply to pay for service.

If you are currently a Federal employee and you want to know whether: (1) a period of service will be creditable for retirement; (2) retirement deductions were withheld from pay; or (3) you received a refund for a period of service, ask your agency for assistance. If you are not currently a Federal employee, write the Office of Personnel Management, Federal Employees Retirement System, P.O. Box 200, Boyers, PA 16020, to ask for the information you need.

To make payment for military service, ask your personnel office for information.

Privacy Act Statement

Title 5, U.S. Code, authorizes solicitation of this information. The data you furnish will be used to determine your eligibility to make payments for retirement credit to the Civil Service Retirement Fund.

This information may be shared with national, state, local or other charitable or social security administrative agencies to determine and issue benefits under their programs or with law enforcement agencies when they are investigating a violation or potential violation of the civil or criminal law.

Executive Order 9397 (November 22, 1943) authorizes use of the Social Security Number. Furnishing the Social Security Number, as well as other data, is voluntary, but failure to do so may delay or prevent action on your application.

Credit For Civilian Service

Payment can be made for:

- Any period of creditable civilian service performed

before 1989 during which no retirement deductions were withheld from your pay.

- Any period of civilian service during which retirement deductions were withheld from your pay **and** refunded to you based on an application you filed before you became covered by FERS.

Payment cannot be made for:

- Any period of service under the Federal Employees Retirement System (FERS) for which you received a refund of your retirement deductions based on an application you filed **after** you had been covered by FERS.
- Temporary or intermittent service which you performed after 1988. Temporary service means an appointment which is limited to one year or less. Intermittent service means an employee has no scheduled tour of duty.
- Any other service which is not creditable under FERS.
- Periods of leave without pay.
- Time covered by a lump sum leave payment.

Amount of payment for civilian service is 1.3 percent of your basic pay for the service, plus interest. The 1.3 percent rate applies regardless of when the service was performed or whether deductions would have been taken at 1.3 percent if they had been taken at the time the service was performed. You must pay the total amount due for a distinct period of service before you can receive credit for it in your annuity. A "distinct period of service" is a period of civilian service that is not interrupted by a break in service of more than three days.

If you pay for part-time service, you will receive credit for the number of hours in your official tour of duty -- e.g., 20 hours per week. If you worked more than your official tour of duty and want credit for extra hours, attach a statement with the name of the agency where you worked, the beginning and ending dates of each period of service, your grade and job title, and the approximate number of hours worked per week. If available, attach copies of any earnings statement which show the number of hours worked.

Interest is computed from the midpoint of each period of service included in the computation. Interest accrues annually on the outstanding balance, and is compounded annually until the portion is deposited. Interest is charged to the date of deposit or

commencing date of annuity, whichever is earlier. Beginning in 1985, interest rates vary each calendar year, according to the interest rates earned by new retirement fund securities. Interest rates through 1988 are as follows:

- before 1948 4%
- 1948 - 1984 3%
- 1985 13%
- 1986 11.125%
- 1987 9%
- 1988 8.375%

Payment is optional. You do not have to pay if you do not want to do so. However, if you do not pay for a period of FERS service, you will **not** receive any credit for it toward retirement, including your eligibility to receive an annuity and computing your average salary.

Payment can be made by ...

- **You** while you are employed by the Federal government and covered by FERS.
- **You** when you retire. OPM will automatically compute any amount payable when you retire and give you an opportunity to pay it. If you are eligible to choose an alternative annuity and receive a lump sum of the money to your credit in the retirement fund, you can ask OPM to deem payment made as part of your lump sum. (NOTE: The alternative annuity is not available to an employee who: 1) retires on a disability annuity; 2) has a spouse who is entitled by court order to benefits; or 3) is married and does not obtain the spouse's consent to the alternative annuity election.)
- **You**, after you leave the Federal Government, provided you are eligible for a deferred annuity because you have at least five years of paid civilian service when you leave.
- **Your surviving spouse** if you die as an employee or separated employee and your spouse is eligible for a survivor annuity benefit. OPM will automatically compute any amount payable and give your spouse an opportunity to pay it.

Payment by you or your spouse must be completed before final adjudication of retirement or survivor benefits.

Payment cannot be withdrawn unless (1) you become eligible for and obtain a refund of all your FERS retirement deductions, or (2) you retire and are eligible to choose an alternative annuity and lump sum payment of your retirement deductions. If you make payment, and later receive a refund, you **cannot** redeposit the money again. If you do not complete payment for a period of service before

your annuity begins, OPM will refund the partial payment, plus interest, at the time of retirement unless you elect an alternative annuity.

Transfer employees who chose to transfer from the Civil Service Retirement System (CSRS) to FERS and who are entitled to have part of their benefits computed under CSRS rules should also use this application to pay for service which will be credited under CSRS rules. OPM will bill you for the appropriate amount. Standard Form 2803, Application to Make Deposit or Redeposit under the Civil Service Retirement System, contains information on deposits and redeposits under CSRS rules. You can obtain a copy of the SF 2803 from your personnel office.

If you will be eligible for a deferred annuity, you are entitled to have part of your benefits computed under CSRS rules, and you received a refund of your CSRS deductions after you transferred to FERS, OPM will not deem that refund to be repaid as part of an alternative annuity computation. You must repay the money to receive credit for this service in your annuity computation.

How To Apply And Make Payment

If you are a Federal Employee, send your completed application to your department or agency because they must certify it. Please do not file an application if you plan to retire within six months. OPM will give you an opportunity to make payment when it computes your annuity.

If you are not a Federal employee now, send your completed application directly to the Office of Personnel Management, Federal Employees Retirement System, P.O. Box 200, Boyers, PA 16020.

Instructions for making payment, together with a bill for the amount due, will be sent to you as soon as OPM processes your application. OPM will also send you an acknowledgment when it receives your application. If you file and do not receive an acknowledgement within 30 days, contact your agency to be sure your application was forwarded to OPM.

Installment payments of at least \$50 are acceptable. However, since interest is chargeable on the unpaid balance, you may have to pay additional interest if you make installment payments.

Additional information and assistance in completing this application may be obtained from your personnel office. If this source of information is not available to you, contact the Office of Personnel Management, Federal Employees Retirement System, P.O. Box 200, Boyers, PA 16020.