



Title: I, Payroll/Personnel Manual

Chapter:

Bulletin: Title I, 12-8 Your Personal Benefits Statement

Date: March 7, 2012

To: Subscribers of All Title I Publications (Payroll/Personnel)

The Personal Benefits Statement, referred to herein as the Benefits Statement, is the annual notification of employee compensation and fringe benefits. The Benefits Statement provides employees with an estimate of their benefits relating to their current position. For employees who are retirement eligible, we suggest they contact their personnel office for a more comprehensive review of their retirement options.

The Benefits Statement describes the estimated:

- value of benefits available to an employee or his/her survivors in the event of voluntary retirement, disability, or death in service
- annuity benefits and account balances from the Thrift Savings Plan (TSP)

The Benefits Statement also states when an employee will be eligible for Social Security and/or Medicare benefits and directs the employee to Social Security Benefits/Medicare Benefits for the explanation.

**Methods for Delivery of the Benefits Statements**

The Benefits Statement will be delivered via mail or electronically for those employees of agencies which have elected paperless distribution of the Benefits Statements.

**Who Will Receive the Benefits Statement**

The Benefits Statement will be delivered to each employee who is eligible for retirement benefits and is covered by one of the retirement coverage codes listed below:

**Code Description**

- C** Civil Service Retirement System (CSRS)
- E** Federal Insurance Contributions Act (FICA) and CSRS - For law enforcement and firefighter personnel
- G** FICA and Foreign Service Retirement and Disability System (FSRDS)
- K** Federal Employees' Retirement System (FERS) and FICA
- M** FERS and FICA - Special

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O	Customs and Border Protection Officers (CBPO) FERS Enhanced
P	Foreign Service Pension System (FSPS) and FICA
R	FICA and CSRS (Full)
Q	CBPO CSRS Offset
T	FICA and CSRS - Special (Full) - For law enforcement and firefighter personnel
0	CBPO Enhanced CSRS
1	CSRS
3	FSRDS
6	CSRS - Special - For law enforcement and firefighter personnel

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Note: CBPO employees who are CSRS Offset will have their statements mailed to the agency (not their home address), and the agency will provide additional information to these employees to supplement the statements.

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Each part-time employee with one of the retirement plans listed above and one of the following work schedules, will receive a Benefits Statement for his/her applicable retirement plan:

<b>Code</b>	<b>Description</b>
P	Part-time
Q	Part-time seasonal
S	Part-time job sharer
T	Part-time seasonal job sharer

The projected timeframe for delivery and/or posting of the Annual Benefits Statement to the National Finance Center's (NFC) Employee Personal Page (EPP) will be the end of March 2012.

#### **Who Will Not Receive the Benefits Statement**

Some employees may not receive the Benefits Statement for the following reasons:

- The employee's retirement coverage code is not shown in the above list.
- The employee is Intermittent/seasonal (i.e., other than work schedule P, Q, S, or T).
- The employee's 6C Retirement Date identifies the service computation date for employees appointed to law enforcement and firefighter positions. This entails that a special retirement deduction rate (Retirement Coverage Code 6, E, M, or T) in the Information/Research Inquiry System (IRIS) Program IR102, Dates & Misc Sal/Pers Data, is invalid. Invalid means that the 6C Retirement Date is earlier than the retirement service computation date or is later than the Benefits Statement date.

- The employee is not eligible for retirement benefits.
- The employee was separated in Pay Period 26 of the prior year or Pay Period 1 of the current year.
- The employee's agency has elected not to issue the Benefits Statement. (See those agencies below).

At the agency's request, the 2011 Benefits Statement will not be issued to employees of the following agencies:

- Architect of the Capitol
- Commission on Security and Cooperation in Europe
- Congressional Budget Office
- Office of the Comptroller of the Currency
- Smithsonian Institution (Trust)
- Treasury U. S. Saudi/Arabian Joint Commission on Economic Cooperation
- Treasury Technical Assistance
- U.S. Botanic Garden
- U.S. Capitol Police
- U.S. Senate Restaurants
- Office of Thrift Supervision

Also, the 2011 Benefits Statement will not be issued to employees with the following work schedule codes:

**Code Description**

<b>I</b>	Intermittent
<b>J</b>	Intermittent seasonal

**Agency Requests Received for Paperless Benefits Statements Option:**

<b>Dept. Code</b>	<b>Agency Name</b>
<b>VA</b>	Office of the Inspector General
<b>FL</b>	Farm Credit Administration
<b>FK</b>	Farm Credit System Insurance Corporation
<b>LC</b>	Library of Congress
<b>GG</b>	Office of Government Ethics
<b>DL</b>	Bureau of International Labor Affairs

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DL	Office of Congressional and Intergovernmental Affairs
DL	Office of Disability Employment Policy
DL	Employment and Training Administration
DL	Office of the Inspector General
DL	Bureau of Labor Statistics
DL	Mine Safety and Health Administration
DL	National Skills Standards Board
DL	Office of Federal Contract Compliance
DL	Office of Labor Management Standards
DL	Office of Public Affairs
DL	Office of Worker's Compensation Programs
DL	Office of the Assistant Secretary for Policy
DL	Employee Benefits Security Administration
DL	Employment Standards Administration
DL	Occupational Safety and Health Administration
DL	Office of the Solicitor
DL	Office of the Assistant Secretary for Administration and Management
DL	Office of the Secretary of Labor
DL	Veterans Employment and Training Service
DL	Women's Bureau
DL	Wage and Hour Division
TR	Financial Management Service
TR	Bureau of the Public Debt
TR	United States Mint
TR	Bureau of the Engraving and Printing
TR	Office of the Comptroller of the Currency
TR	Departmental Offices
TR	Internal Revenue Service

TR	Alcohol and Tobacco Tax and Trade Bureau
TR	Treasury Office of the Inspector General
TR	Financial Crimes Enforcement Network
TR	Office of Inspector General for Tax Administration
SM	Smithsonian Institution (Federal)
SM	Woodrow Wilson International Center for Scholars (Federal)
LG	Government Accountability Office
HS	Federal Law Enforcement Training Center
HS	Federal Emergency Management Agency
HS	Bureau of Customs and Border Protection
HS	Domestic Nuclear Detection Office
HS	Office of Inspector General
HS	Immediate Office of the Secretary
HS	United States Secret Service
HS	Office of the Under Secretary (S & T)
DJ	Drug Enforcement Administration
DJ	United States Marshals Service
DJ	Bureau of Alcohol, Tobacco, Firearms and Explosives
DJ	United States Trustee Program
HU	Housing and Urban Development
HU	Office of Federal Housing Enterprise Oversight
HU	HUD Office of Inspector General
CM	Office of the Secretary
CM	Economic Development Administration
CM	Bureau of Economic Analysis
CM	International Trade Administration
CM	Patent and Trademark Office
CM	National Institute of Standards and Technology

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CM	Minority Business Development Agency
CM	National Telecommunications and Information Administration
CM	National Technical Information Service
CM	Office of the Inspector General
CM	Economics and Statistics Administration
CM	Bureau of Industry and Security
FD	Federal Deposit Insurance Corporation
FC	Federal Communications Commission
GW	International Boundary & Water Commission
NP	National Capital Planning Commission

### Nonreceipt of the 2011 Benefits Statement

If an employee does not receive the 2011 Benefits Statement by Monday, April 16, 2012, the employee has the following options:

- The employee can access EPP (if the agency utilizes the application).
- Access the Personal Benefits Statement (under the Financial Reports menu) via the Reporting Center. Current Users will have access to this report. No additional security access request is necessary.
- A reprint request can be submitted through the Special Payroll Processing System (SPPS) Inquiry option by the agency. The request should include the employee's name and social security number. Reprints of Benefits Statements will be available through Friday, June 1, 2012.

### Payroll/Personnel Output Procedure

Exhibit 162 of the Payroll/Personnel Output (PPO) procedure, which is available online at *NFC Home Page* (<http://www.nfc.usda.gov>), will be updated to include the information in this bulletin. To view this procedure, go to the *NFC Home Page* (<http://www.nfc.usda.gov>), and click the Publications link at the top of the page. At the publications page right-hand menu, click Procedure by Acronym and select Payroll/Personnel Output (PPO). Changes to the PPO procedure are identified by "▶◀".

Listed below are the changes that will be made to Exhibit 162:

- Changes the TSP annuity interest rate index to 2.250%.
- Changes the FERS death benefit additional amount payable to \$30,792.98.
- Changes the 2011 dates and numeric factors to the 2012 dates and factors where applicable.

**Inquiries**

Please consult Chapter 20, Section 5, Payroll/Personnel Output, Exhibit 162, Your Personal Benefits Statement, for detailed information about each item on the Benefits Statement. The Benefits Statement is also available on EPP of NFC's Web site. Employee inquiries about the Benefits Statement should be handled by the employee's servicing personnel office.



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