Getting Your "Docs" in a Row

Presented by ProFeds

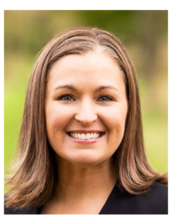
Getting Your "Docs" in a Row

Welcome

- About today's topic
- Our audience today
- Q&A – the ProFeds Support Team standing by
- Handouts – available for download
- Recorded – how to get the replay
- Stay until the end!

Getting Your "Docs" in a Row

Your ProFeds Presenter



FedImpact Retirement Training presented by ProFeds

Chris Kowalik

- ProFeds Founder
- Developer of the FedImpact Retirement Workshop
- Host of the FedImpact Podcast

Support Team

- Standing by for your questions

Getting Your "Docs" in a Row

Getting Your Docs in a Row

How to get yourself organized before leaving federal service

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Getting Your "Docs" in a Row

Agenda

- DOCUMENTS: address complicated service history to ensure your service record is accurate
- AMOUNTS OWED: identify any special service that required money to be paid to get credit (for eligibility and for the calculation of your pension)
- COPIES & ACCESS: secure copies of critical documents that you'll lose access to upon leaving service

Getting Your "Docs" in a Row

What this webinar will NOT cover

Getting Your "Docs" in a Row

Your Official Personnel File

Getting Your "Docs" in a Row

Your Official Personnel File

- Download/Print a copy of your entire eOPF
  - Login through your agency's access point
  - Select "My eOPF" then "My eOPF Print Folder"
- If you have questions about the technical aspects of your eOPF, email **eopfhelpdesk@opm.gov**
- Keep a copy of your entire file in a safe place for your family (PRINTED is best)

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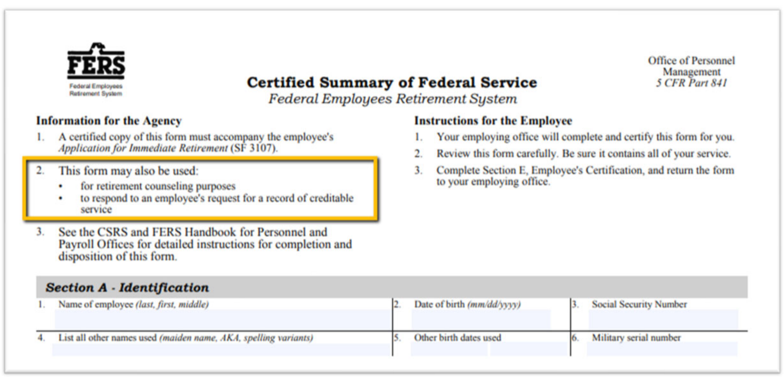
Service History & Credit

Getting Your "Docs" in a Row

Service History & Credit

- Ensure that all of your federal service is listed in your Official Personnel File & confirm you get credit for:
  - Eligibility purposes
  - Pension calculation purposes
- Submit a Certified Summary of Federal Service
  - CSRS: SF-2801-1 (pages 17-18)
  - FERS: SF-3107-1 (pages 9-10)

Getting Your "Docs" in a Row



FERS
Federal Employees Retirement System

Office of Personnel Management
5 CFR Part 841

Certified Summary of Federal Service
Federal Employees Retirement System

Information for the Agency

1. A certified copy of this form must accompany the employee's *Application for Immediate Retirement* (SF 3107).
2. This form may also be used:
   - for retirement counseling purposes
   - to respond to an employee's request for a record of creditable service
3. See the CSRS and FERS Handbook for Personnel and Payroll Offices for detailed instructions for completion and disposition of this form.

Instructions for the Employee

1. Your employing office will complete and certify this form for you.
2. Review this form carefully. Be sure it contains all of your service.
3. Complete Section E, Employee's Certification, and return the form to your employing office.

Section A - Identification

1. Name of employee *(last, first, middle)*	2. Date of birth *(mm/dd/yyyy)*	3. Social Security Number
4. List all other names used *(maiden name, AKA, spelling variants)*	5. Other birth dates used	6. Military serial number

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Certified Summary

- Your agency will complete the Certified Summary of Federal Service and return it to you
  - STEP 1: Verify that all of the time you ever worked as federal employee is listed (notify your agency if any service is missing)
  - STEP 2: Address any pieces of service which indicate “deposit owed” or “refunded” to get full credit

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Deposits & Redeposits

- If you made a payment for any kind of service, save the receipt (or any records of payment like a “paid in full” letter from your agency); this includes:
  - Non-deduction service
  - Refunded service
  - Military service
- If you plan to make a deposit, do so before you leave service

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Healthcare Matters

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Healthcare Matters

- Use all of your Flexible Spending Account before you retire (or else you forfeit the remaining balance)!
- If you have a disabled child, take the necessary steps to ensure they retain FEHB after you die by verifying that the required “Medical Certificate” is in your eOPF AND keep a copy for family

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Healthcare Matters

- If you are OVER age 65 when you retire from federal service, you need a special form from your agency that tells Medicare that you had employer-sponsored health insurance
- Your agency should complete form CMS-L564
- You’ll use this form to avoid paying any penalties if you wish to enroll on Medicare Part B

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Retirement Documents

Retirement Documents

- Keep a copy of all final documents submitted to your agency for your retirement package:
  - Retirement Application
  - FEGLI Continuation of Coverage election
  - Tax withholding form
- Save a copy of your benefits/annuity estimate prepared by your agency

Retaining Access

Retaining Access

- Think of all of the access that you have to documents based solely on your ability to log in to government computer systems while you are employed
- Take the TSP for instance:
  - If you forget your TSP password, you'll be required to get "Two Factor Authentication" to reset your password
  - If your Two Factor Authentication settings list your government email or cell number, you're toast!

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Administrative Matters

Administrative Matters

- Forward/print any important emails that you wish to keep (of course, we're not talking about sensitive information)
- Save email addresses & phone numbers of work colleagues or agency points of contact that you may need to reach after leaving service
- Download training certificates or other necessary documents for future employment

Administrative Matters

- Ensure ALL of your beneficiaries are updated to include your current wishes
- For forms and instructions, go to **FedImpact.com/beneficiaries**
- Do NOT wait until you retire to submit these!

WRAP-UP

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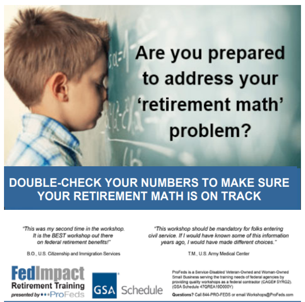
Double-check Your Retirement Math



- Attend a workshop:
  - In-person training
  - No cost to attend
  - Covers all of the federal benefit topics and decisions to be made
  - One-on-one help available
- See all the details at FedImpact.com/Attend

Handouts & Replay

LINK TO REPLAY

- Handouts
  - Download
  - Emailed
- Replay
  - Link will be emailed to all registered participants

Next Webinar

- Next webinar topic!
  - **Your TSP – Love it or Leave it?** Helping feds understand their often complicated relationship with the TSP – and deciding if a breakup is in their future
  - Sign-up at: FedImpact.com/Webinar

Find a workshop: FedImpact.com/Attend
Next webinar: FedImpact.com/Webinar

Thank you for joining us

Stay tuned for benefits and news updates!

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