

1. General Information

a. Responsibilities:

1) The Benefits and Entitlements Service Team (BEST) (AFPC/DPCMB) is responsible for Health Insurance, Life Insurance, Thrift Savings Plan, Retirement, and Survivorship issues.

2) Civilian Personnel Flights (CPFs) refer all other questions regarding centralized servicing to the appropriate AFPC/DPC division.

3) CPFs maintain responsibility for all Employee Relations issues.

b. Forms:

1) **Organizational Representative/Unit Forms Manager Action:** Establishes requirement for personnel forms required by unit employees. The Organizational Representative orders forms through the Electronic Transaction System (ETS).

2) **CPF Action:**

a) Notifies employees of local procedures for obtaining personnel forms and publications in accordance with HQ USAF/DPC letter dated 18 July 1996, Subject: Current Benefits and Entitlements (B&E) Forms Availability and Future B&E Servicing Concept.

(1) Primary source of forms is the unit Organizational Representative.

(2) Forms are also available on the World Wide Web at <http://www.opm.gov/forms/>, with the exception of Thrift Savings Plan forms, which are available at <http://www.tsp.gov>.

b) Refers employees inquiring about how to obtain forms back to their unit Organizational Representative, the World Wide Web, or Delrina Form Flow/Jet Form software. If the employee does not have Form Flow on his/her personal computer, refer the employee to his/her supervisor to obtain the location of a personal computer where Form Flow is installed and is available for use.

c) Notifies AFPC/DPCMB of local procedures for obtaining personnel forms.

3) **AFPC/DPCMB Action:** BEST does not provide blank forms to employees.

4) **Employee Action:** Obtains forms from the unit Organizational Representative, the World Wide Web, or via Delrina Form Flow/Jet Form software on personal computer.

5) **Management/Supervisor Action:** Ensures their office or orderly room has Delrina Form Flow/Jet Form software available to print forms for unit employees.

c. Customer Access: Employees may obtain general information, personal information, or make benefits elections through the BEST automated phone system or the Employee Benefits Information System (EBIS) web system on the AFPC web site. If an employee needs to speak with a benefits counselor, he/she must use the BEST automated phone system.

1) **BEST Automated Phone System.** Employees may contact the BEST automated phone system by dialing 1-800-997-BEST (2378). Employees in the San Antonio area must call commercial 527-2378. Employees calling from overseas will call toll-free by first dialing an AT&T or MCI toll-free access number for the country in which located. Overseas employees should contact their CPF for the applicable toll-free number. Hearing impaired employees may contact a Benefits Counselor by calling TDD 1-800-382-0893, or commercial 565-2276 within the San Antonio area.

a) When the phone system answers, employees must provide their social security number (SSN) and four or six digit personal identification number (PIN). An employee's original PIN (four-digit number) is the month and year of birth; for example, June 1956 is 0656. The first time an employee uses the system, he/she will input his/her original four-digit PIN. The system will then require the employee to select a new six-digit numeric PIN. For security reasons, new employees are advised to immediately access the system and change their four-digit PIN to a six-digit PIN.

b) The system also allows employees who have forgotten their PIN number to establish a new PIN without the assistance of a counselor. Upon calling the BEST automated phone system, the system will prompt employees to press 1 to enter their SSN and PIN, or press 2 if the employee has forgotten their PIN. Upon pressing 2, the system will ask the employee to enter the following information, which can be obtained from the Leave and Earnings Statement (LES): social security number (SSN), date of birth, service computation date for leave (SCD Leave), and civilian pay plan, grade, and step. Once the system verifies this information, it will ask the employee to input a new six-digit PIN. If the new PIN meets security guidelines, the employee will be asked to enter the new PIN a second time. If both entries match, the employee will hear "Your PIN has been changed." He/she may then proceed through the automated system.

c) A new, rehired, or transferred employee should be able to use the BEST automated phone system the second duty day, providing the AFPC Staffing Team has input the accession action into Modern DCPDS by the Friday before the entry on duty (EOD) date. This includes employees who transfer in from another base or agency not previously serviced by AFPC. Employees who cannot access the automated phone system should contact their CPF who will in turn contact BEST.

d) Employees using the BEST automated phone system to elect Federal Employees Health Benefits (FEHB) self and family coverage must make their election between 7:00 A.M. and 7:00 P.M., Monday through Friday, Central Standard Time (CST). Once the employee has input their dependents' social security number(s), date of birth, relationship, sex, and zip code, the system will automatically transfer the employee to a benefits counselor to capture the names of

the employee's dependents. In addition, employees who have other health insurance coverage (such as Medicare, Champus/Tricare, or other group coverage) and who desire to enroll via the BEST automated phone system must do so between 7:00 A.M. and 7:00 P.M., Monday through Friday, CST. The system will transfer these employees to a benefits counselor to capture the "other" health insurance coverage data.

2) **EBIS Web System.** EBIS is located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm.

a) The first time an employee uses the EBIS web system, he/she must create a UserID and password. Click on "Enter the EBIS Security Log-On", then on the "Civilian" button. The system will ask the employee to enter the following information, which can be obtained from the most recent Leave and Earnings Statement (LES): social security number (SSN), date of birth, service computation date for leave (SCD Leave), and civilian pay plan, grade, and step. The employee will then click on "Submit". Once the system accepts this information, the employee will select a UserID and password. The system will default to the first four letters of the employee's last name and the last four numbers of his/her SSN if he doesn't enter his own UserID and password. The system will also require the employee to enter their DSN phone number, and a valid E-mail address. Upon acceptance, the system will send the employee back to the "Login" page where he/she will enter the new UserID and password, and click on "Submit". Next, click on the "EBIS" button. The employee will then conduct his/her benefits transactions, inputting his/her SSN and BEST PIN number where requested. The BEST PIN number is the same one used for the telephone system. In addition, due to current system security, employees who do not log in to one of the AFPC DPC Interactive Web Applications (EBIS, Electronic Official Personnel Folder, Online Career Program Registration) at least once every 120 days will have to re-establish their password.

(**Note:** Employees must enter a verifiable E-mail address to use EBIS. Employees who have neither an official nor a personal E-mail address may obtain a free E-mail account from GiMail at <https://www.gimail.af.mil>. This address will not work as a link – it must be entered into the web browser. When creating the GiMail account, employees must use a government computer in the ".mil" domain, such as one in a Base Library or Family Support Center. Once the account is established, it can be accessed from anywhere in the world. See the Full Service Question and Answer Booklet, BEST Systems Access chapter, for further information. It is available on the BEST homepage at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

b) A new, rehired, or transferred employee should be able to use EBIS on Friday of the week hired providing the AFPC Staffing Team inputs the accession action by Wednesday of the week hired. The AFPC systems office runs the web security database update program every Thursday evening.

c) Employees may make FEHB self and family elections in EBIS without counselor assistance. However, employees with more than 10 dependents must use the BEST automated phone system to accomplish the enrollment. Employees with "other" health insurance coverage may conduct their enrollment in EBIS without counselor assistance.

d) Employees who have questions or problems creating the UserID or password within EBIS, or already created one but forgot it, should contact the AFPC Technical Assistance

Center for assistance. Telephone numbers and an E-mail link for contacting the AFPC Technical Assistance Center are located on the EBIS Log-On page. For questions concerning selections within the EBIS system, employees should contact BEST at 1-800-997-2378 (commercial 527-2378 if calling within the San Antonio area).

3) **Separated employees** who are interested in FEHB Temporary Continuation of Coverage (TCC) should contact BEST at 1-800-540-4047, or commercial 527-2399 if calling within the San Antonio area.

4) **Retired Air Force (AF) civilian employees** can receive referral information for the Office of Personnel Management (OPM), National Finance Center (NFC), National Association of Retired Federal Employees (NARFE), and the Social Security Administration (SSA) by calling BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area. When the system answers, press “2” for Benefits and Entitlements, then “2” for retired AF employee or survivor of retired AF employee.

5) **Non-Appropriated Fund (NAF) employees** who retain retirement coverage under the Civil Service Retirement System (CSRS) or Federal Employees Retirement System (FERS) may need information or estimates regarding their retirement. These employees are unable to use either the BEST automated phone system or the EBIS web system. If a CSRS or FERS-covered NAF employee desires to speak with a BEST benefits counselor, he/she should contact BEST at 1-800-540-4047 (or commercial 527-2399 if calling within the San Antonio area).

6) **CPF Action:**

a) CPFs contact BEST at 1-800-540-4047, or commercial 527-2399 if calling within the San Antonio area. Do **not** provide these numbers to current Federal employees, except for the few instances listed in this Guide. CPFs should provide this number(s) to CSRS or FERS-covered NAF employees who need to speak to a BEST counselor regarding their retirement benefits.

b) Do not process any FEHB, TSP, or FEGLI actions on behalf of an employee. Employees are required to use the BEST automated phone system or the EBIS web system.

c) If an employee is unable to access the BEST automated phone system, obtain the employee’s name, SSN, and telephone number and provide to AFPC/DPCMB for assistance. However, if the access problem is due to late or erroneous accession coding, contact the servicing AFPC Staffing Team for resolution of the accession problem.

7) **AFPC/DPCMB Action:** Contacts employee to determine and resolve access problems.

d. Home Address Changes:

1) **Employee Action:** Files change through local civilian payroll liaison office or through the Defense Finance and Accounting Service (DFAS) Employee/Member Self Service (E/MSS) web application located at <http://emss.dfas.mil/emss.htm>. Also notifies immediate supervisor.

2) **CPF Action:** Refers employee to local civilian payroll liaison office or E/MSS web site (<http://emss.dfas.mil/emss.htm>) to make home address change. Reminds employee to notify supervisor of address change.

e. Obtaining Employee Record Data:

1) **Employee Action:** Accesses the Electronic Official Personnel Folder (if the base has completed impact and implementation negotiations). (A complete list of bases with employee access is listed at http://www.afpc.randolph.af.mil/dpc/EOPF/eopf_auth.htm.) If unable to access the Electronic Official Personnel Folder, the employee may contact his/her supervisor or the CPF for access to OPF data.

2) **CPF Action:**

a) Refers supervisors to the Civilian Servicing Unit (CSU) application, if available, for employee personnel information. Refers employees to the Electronic Official Personnel Folder, if available.

b) Obtains requested data from PARIS (Personnel Automated Records Information System) via CyberDOCS.

c) Requests benefits-related OPF documents which CyberDOCS is unable to retrieve from PARIS directly from AFPC/DPCMP (OPF Management) at DSN 665-2916.

3) **AFPC Action:** AFPC/DPCMP obtains CPF-requested documents and sends by fax to the CPF.

f. Obtaining Marketing Materials:

CPF Action:

1) Obtains marketing materials from the BEST Homepage at <http://www.afpc.randolph.af.mil/dpc/BEST/menu.htm>. These materials include, but are not limited to, the following:

- a) Questions and Answers Booklet (downloadable version)
- b) Benefits Summary for New Civilian Employees
- c) BEST Trifold

2) Provides new employees BEST marketing materials during “in-processing.”

g. Accessing PARIS via CyberDOCS

CPFs may access PARIS via CyberDOCS software on the Air Force Personnel Center Directorate of Civilian Personnel Operations (AFPC/DPC) web site. The address is <http://www.afpc.randolph.af.mil/dpc>. The user will press the PARIS selection under AFPC/DPC Interactive Web Applications and then log in on the AFPC Secure Web Sites page. Once

successfully logged in, clicking the PARIS button will take the user to the CyberDOCS log in page. Each CPF should check with their Personnel Systems Manager (PSM) for CyberDOCS log-on data.

h. Benefits Changes Resulting from Settlement Agreements and Third Party Decisions

1) Settlement Agreements:

a) CPF Action:

(1) In the early drafting stages of settlement agreements, CPFs should contact AFPC/DPCMB to discuss agreement provisions that cover one or more of the benefits programs administered by BEST. CPFs should not commit without first checking if a certain action(s) can be taken as part of a settlement.

(2) Alerts AFPC/DPCMB as early as possible on the pending settlement agreement which will need urgent/immediate action by BEST.

(3) Provides AFPC/DPCMB all the necessary documentation to effect the settlement agreement provisions, which may include ensuring employees take whatever action is necessary with regard to their benefits, as part of the settlement agreement.

(4) Follows up with BEST and the employee to ensure provisions outlined in the settlement have occurred.

b) AFPC/DPCMB Action:

(1) Takes timely action, in accordance with the settlement agreement, to effect the actions specified.

(2) Communicates/works closely with CPFs to ensure final actions are correctly processed. Notifies CPFs when actions have been completed.

2) Third Party Decisions (MSPB, EEOC, Arbitration, Courts)

a) CPF Action:

(1) Provides AFPC/DPCMB with decisions issued by third parties such as MSPB, EEOC, arbitrators, courts, and others, when the decision requires action regarding FEGLI, FEHB, TSP, and/or retirement.

(2) Provides AFPC/DPCMB all the necessary documentation to effect the decision, and ensures the employee takes whatever action is necessary with regard to their benefits as part of the decision.

b) AFPC/DPCMB Action:

(1) Takes timely action, in accordance with the third party decision, to effect any changes to FEHB, FEGLI, TSP, and/or retirement as a result of the decision.

(2) Communicates/works closely with CPFs to ensure final actions are correctly processed. Notifies CPFs when actions have been completed.

2. In-Processing Procedures

a. Employee Action:

- 1) Reviews in-processing package information and follows instructions.
- 2) Makes elections through the BEST automated phone or EBIS web systems. If employee is unable to access the BEST automated phone system, notifies the CPF who will contact AFPC for resolution. If unable to access the EBIS web system due to problems with creating the UserID or password, the employee should contact the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page.
- 3) For issues associated with late or erroneous accession data in Modern DCPDS (i.e., late accession coding, SF 75 information not transferring), contact the CPF with questions.
- 4) Reviews Leave and Earnings Statement (LES) to ensure FEHB, FEGLI, and TSP elections are correct. The LES serves as official notification of elections.
- 5) If previously participated in TSP, and rehired within 31 days of separation, reviews LES to ensure most recent election resumes.
- 6) Certain employees rehired under the Civil Service Retirement System (CSRS), CSRS-Offset, or FICA have 6 months after date of rehire to elect to transfer to the Federal Employees Retirement System (FERS).
 - (a) Upon receipt of Standard Form 3109 (Election of Coverage-Federal Employees Retirement System) from the CPF, the employee should complete Part 1 verifying receipt of the form, and return it to the CPF during in-processing.
 - (b) Obtains the FERS Transfer Handbook (RI 90-3) from the CPF or from the AFPC DPC web site (<http://www.afpc.randolph.af.mil/dpc/BEST/newemp-full.htm>).
 - (c) Contacts BEST for advisory service.
 - (d) Within 6 months of rehire, completes the SF 3109 indicating whether he/she wishes to elect FERS coverage or not. Faxes the completed SF 3109 to BEST at DSN 665-2936 or commercial (210) 565-2936.
 - (e) If the employee elects to transfer to FERS, he/she will be eligible to change or begin making contributions to the Thrift Savings Plan. If employee desires, he/she may fax a completed Form TSP-1 to BEST with the SF 3109. If faxed separately, TSP-1 must be received

by BEST not later than 30 days after the effective date of transfer to FERS. The BEST fax number is DSN 665-2936 or commercial (210) 565-2936. Form TSP-1 may be obtained from the unit forms Organizational Representative, or from the TSP web site at <http://www.tsp.gov/forms/index.html>.

b. CPF Action:

1) Ensures RPA and related accession materials are forwarded to the appropriate AFPC Staffing Team in a timely manner.

2) Ensures the B&E Video is shown to all newly-hired employees and employees transferring in.

3) Gives each new employee the following materials, which are located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>:

- Benefits Summary for New Civilian Employees
- Questions and Answers Booklet
- BEST Trifold

4) Prepares SF 2810, Notice of Change in Health Benefits Enrollment, for employees with health insurance who are transferring-in from another agency or payroll office. Contacts the AFPC Staffing Team who has SF 75 information for the data for SF 2810, or obtains from employee if he/she has most recent LES. Forwards carrier copy of the SF 2810 directly to the carrier. Destroys the payroll office copy. Provides OPF copy to AFPC/DPCMB via fax at DSN 665-2936 or commercial (210) 565-2936.

5) Prepares TSP-19, Transfer of Information Between Agencies, for employees with a current TSP loan. This information can be obtained from the employee during in-processing. Forwards original copy to payroll. CPFs should not forward a copy to BEST.

6) Refers employees to the BEST automated phone system or EBIS web system (located on the AFPC DPC web site http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make elections. If the employee is unable to access the systems, or discovers FEHB/FEGLI/TSP is incorrect on LES due to late or erroneous accession coding, contacts the appropriate AFPC Staffing Team for resolution of the accession problem. At the same time, provides the employee's name, SSN, and telephone number to AFPC/DPCMB. A benefits counselor will contact the employee, and if appropriate, will accomplish a counselor-assisted, on-line enrollment.

7) Rehired CSRS, CSRS-Offset, or FICA employees are eligible to elect FERS coverage during the first 6 months after rehire. The CPF will take the following steps:

(a) Issue SF 3109 during in-processing and collect the signed Part 1. Faxes Part 1 to BEST at DSN 665-2936 or commercial (210) 565-2936. Advise employees to make their election to transfer to FERS or not and fax Part 2 to BEST within 6 months of date of rehire.

(b) Provide employees with the FERS Transfer Handbook (RI 90-3) or direct them to the AFPC DPC web site to review it (<http://www.afpc.randolph.af.mil/dpc/BEST/newemp-full.htm>).

(c) Advise employees they will be eligible to change or begin contributions to the Thrift Savings Plan within 30 days of the effective date of transfer to FERS. Advise employees to fax completed TSP-1 directly to BEST, either with SF 3109 or separately, but if separately, it must arrive at BEST not later than 30 days after the effective date of transfer to FERS. Refer employees to their unit Organizational Representative or the TSP web site (<http://www.tsp.gov/forms/index.html>) to obtain Form TSP-1.

(d) Refers employees to BEST for counseling on their transfer decision.

c. AFPC Staffing Team Action:

1) Under normal circumstances, inputs accession actions into Modern DCPDS prior to the entry on duty date (EOD) date, or expeditiously thereafter, so that eligible employees will be able to conduct benefits transactions via the BEST automated systems.

2) Ensures critical data elements for FEHB, FEGLI, and TSP are included on the RPA.

(a) FEHB. Critical data elements are:

- Date FEHB Eligibility Expires. Used to identify employees who are within 60 days of their EOD date: rehires, first-hires, and employees converting from a temporary to a permanent appointment.
- Health Plan. Do not leave blank or eligible employees will not be able to access the automated systems. Enter ZZ.
- Enrollment. Edits for self and family enrollments. For appointments over 1 year, i.e., rehires, first hires, and employees converting from a temporary to a permanent appointment, this data element should be X, Enrollment Pending. For appointments limited to 1 year or less, it should be Z, Ineligible.
- Date Temp Eligibility FEHB. The date a temporary employee becomes eligible for FEHB (**1 year** of continuous service); input when processing the extension of temporary appointment with the date employee will reach 1 year of continuous service. Do NOT input with later extensions where employee is already **past** the 1 year of continuous service.

(b) FEGLI. Ensures previous FEGLI election resumes if employee had a break in service of less than 180 days and is hired on an appointment eligible for coverage. Critical FEGLI data elements are:

- FEGLI Used to edit for FEGLI enrollments.
- FEGLI Eligibility Expiration. Date employee's option to elect life insurance expires (31 days from appointment for new hires with FEGLI code of C0). (Reinstate the previous coverage for employees rehired with a break in service)

of less than 180 days. An employee who transfers from one agency to another without a break in service is not a new employee.)

(c) TSP. If employee was previously participating in TSP and is rehired within 31 days of separation, ensures most recent election resumes. Where applicable, places remark on SF 50 advising eligible employees of their right to elect FERS (and TSP) within 6 months of reemployment. Critical TSP data elements are listed below; however, no TSP data is coded when retirement code is 2 or 5.

- Plan (Retirement Code)
- TSP Status. Status code for TSP participation.
- TSP Date. The effective date of the status code.
- TSP SCD. Used to determine when vesting occurs for the agency 1% contribution. Code for FERS employees only.
- TSP Rate. Whole percent. Code only for employees with Status Code of W or Y who are contributing a percent of their pay. Do not code if contributing a dollar amount.
- TSP Amount. Dollar amount of contribution. Whole \$\$\$\$\$. Code only for employees with a Status Code of W or Y who are contributing a dollar amount. Do not code if contributing a percent amount.
- TSP Agency Contribution Eligibility Date. Used to determine date agency contributions will begin for FERS employees. Leave blank for CSRS employees.
- TSP Employee Contribution Eligibility Date. Required only if TSP Status is T or S. Documents date employee will be/was eligible to resume contributions.

3) Determines which rehired CSRS, CSRS-Offset, and FICA employees are entitled to a 6 month opportunity to elect to transfer to FERS. Places appropriate remark on SF 50 regarding the employee's 6-month opportunity to elect FERS coverage.

d. AFPC/DPCMB Action:

- 1) Provides advisory service to employees.
- 2) Contacts employees regarding access problems. Prepares a counselor-assisted, on-line transaction if the employee is unable to make the election through the BEST automated systems. Processes the action once it is determined the employee is entitled to a benefits election.
- 3) Counsels employees regarding FERS transfer elections. Provides CSRS-FERS Benefit Comparison to requesting employees.
- 4) Processes SF 3109 and TSP-1 upon receipt. Generates and authenticates SF 50. Scans SF 3109 and TSP-1 into PARIS.

3. Out-Processing Procedures

a. Employee Action:

1) Obtains from CPF and reviews the TSP Withdrawal Package, and the pamphlet “Temporary Continuation of Coverage under the FEHB Program” (RI 79-27).

2) Reviews FEGLI conversion and Option B portability statements on the base clearance sheet.

(a) Indicates on Clearance Sheet if planning to convert insurance to private policy.

(b) Indicates on Clearance Sheet if planning to port (continue) Option B coverage, if applicable.

(c) Requests SF 2821, Agency Certification of Insurance Status, from BEST if planning to convert insurance.

(d) Requests Option B Portability Election Form from BEST if planning to port (continue) Option B.

3) Contacts BEST for advisory service.

4) If entering into LWOP status prior to separation, obtains the handout “Benefits Summary for Employees on Leave Without Pay (LWOP)” from the CPF. The handout is also available on the AFPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>. Reads the document, annotates the election form, and faxes to BEST at DSN 665-2936, or commercial (210) 565-2936.

b. CPF Action:

1) Provides CSRS and FERS employees separating from Federal service the following TSP Withdrawal Package or refers employees to the TSP web site at <http://www.tsp.gov/forms>:

- Withdrawal Information Folder (TSPBK01)
- The booklet “Withdrawing Your TSP Account After Leaving Federal Service” (TSPBK02)
- The booklet “Thrift Savings Plan Annuities” (TSPBK05)
- Form TSP 70, Withdrawal Request, with Form TSP-70-T, Transfer Information, attached
- The notice “Important Tax Information About Payments From Your TSP Account” (TSP-536)
- Form TSP-3, Designation of Beneficiary
- Form TSP-16, Exception to Spousal Requirements
- Form TSP-9, Change of Address for Separated Participants

2) Refers all questions regarding withdrawal to AFPC/DPCMB, the TSP Service Office or ThriftLine, or the TSP web site at <http://www.tsp.gov>. The ThriftLine phone number is (504) 255-8777. The TSP Service Office number is (504) 255-6000 (TDD: 504- 255-5113). The

mailing address is: Thrift Savings Plan Service Office, National Finance Center, P.O. Box 61500, New Orleans LA 70161-1500.

3) Provides SF 2810, Notice of Change in Health Benefits Enrollment, to employees resigning or separating by other than retirement or death. Obtains data necessary for completion of SF 2810 from the Civilian Servicing Unit (CSU) application. Forwards carrier copy directly to the carrier. Destroys the payroll office copy. Faxes OPF copy to AFPC/DPCMB at DSN 665-2936 or commercial (210) 565-2936.

4) Provides separating employees with the booklet “Temporary Continuation of Coverage (TCC) under the FEHB Program” (RI 79-27), or refers them to the OPM web site at http://www.opm.gov/insure/health/hr_pubs.htm to obtain it. Encourages employees interested in TCC to obtain one of the following **PRIOR** to separation (note: after separation, employees will not be able to access the BEST automated phone system):

(a) Fax-back document #1002, “Temporary Continuation of Coverage,” through the BEST automated phone system, *or*

(b) Handout “Temporary Continuation of Coverage,” located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm>.

5) Add the following statement to the local clearance sheet: “Are you considering converting your life insurance to a private company? If yes, you should contact the BEST at 1-800-997-2378 (or commercial 527-2378 if calling within the San Antonio area), and request SF 2821, Agency Certification of Insurance Status,” before your separation date. After separation, call 1-800-540-4047 (or commercial 527-2399 if calling within the San Antonio area).”

6) Add the following statement to the local clearance sheet: “Are you considering porting (continuing) Option B coverage after separation? If yes, you should contact the BEST at 1-800-997-2378 (or commercial 527-2378 if calling within the San Antonio area) and request the “Portability Notice” before your separation date. After separation, call 1-800-540-4047 (or commercial 527-2399 if calling within the San Antonio area).”

7) Provides SF 2819, Notice of Conversion Privilege, to separating employees who are enrolled in FEGLI. Faxes copy to AFPB/DPCMB at DSN 665-2936 or commercial (210) 565-2936 for profiling into PARIS.

8) Advises employee to contact BEST for SF 2821, Agency Certification of Insurance Status, if the employee wishes to convert to a private policy, or the Portability Notice if the employee wishes to port Option B coverage.

9) Provides employees entering a LWOP status the handout “Benefits Summary for Employees on Leave Without Pay (LWOP)” located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

10) If the employee will be on LWOP to enter **military** service, provides the handout “Information for Employees Entering Military Active Duty” located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

11) Provides employees wishing to apply for a refund of their retirement contributions the following forms: SF 2802, "Application for Refund of Retirement Deductions (CSRS)," or SF 3106, "Application for Refund of Retirement Deductions (FERS)." Refers employees with questions to BEST.

c. AFPC/DPCMB Action:

- 1) Provides advisory service.
- 2) Provides SF 2821, Agency Certification of Insurance Status, to employees requesting to convert FEGLI to a private policy.
- 3) Provides Option B Portability Notice as requested by eligible employees.
- 4) Upon receipt of completed Portability Election from employees, completes as specified in the FEGLI section of this guide.
- 5) Processes FEHB election to continue or terminate benefits for employees entering on LWOP.

4. Thrift Savings Plan

a. TSP Accession Procedures:

- 1) **Employee Action:**
 - a) Reviews accession package information provided by the CPF and follows instructions.
 - b) If previously participating in TSP, and rehired within 31 days of separation, reviews Leave and Earnings Statement (LES) to ensure most recent election resumes.
 - c) For issues associated with late or erroneous accession data in Modern DCPDS (i.e., late accession coding, SF 75 information not transferring), contacts CPF with questions.
 - d) Employees with a current TSP loan who are transferring to another agency or payroll office should inform the new CPF of the TSP loan to ensure continuity of loan payments.
- 2) **CPF Action:**
 - a) Refers advisory questions from employee to AFPC/DPCMB.
 - b) For issues associated with accession data in Modern DCPDS (i.e., late or erroneous accession coding, SF 75 information not transferring), contacts the appropriate AFPC Staffing Team for resolution. Provides employee name, SSN, and telephone number to AFPC/DPCMB for contact to determine if a counselor-assisted, on-line enrollment needs to be accomplished.

c) Prepares TSP-19, Transfer of Information Between Agencies, for employees with a current TSP loan. Forwards original TSP-19 to payroll. Do not forward a copy to BEST.

3) **AFPC/DPCMB Action:**

a) Provides advisory service to employees.

b) Contacts employee regarding access problems. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated systems. Relies on Interactive Voice Response System (IVRS)/EBIS/DCPDS interface update to DFAS.

c) Provides PARIS an electronic data stream to populate Form TSP-1.

4) **AFPC Staffing Team Action:**

a) Inputs TSP accession information into Modern DCPDS. (See paragraph 2.c.2)(c) for critical TSP data elements.)

b) Ensures latest TSP-1 contributions resume upon rehire if employee was previously participating and had a break-in-service of LESS than 31 full calendar days. Relies on Modern DCPDS interface with DFAS for update. A hard copy for DFAS is not necessary.

5) **AFPC/DPCMP (OPF Management) Action:** Scans latest TSP-1 into PARIS, if not previously done.

b. TSP Open Season

1) **Employee Action:**

a) Receives Open Season notification through Leave and Earnings Statement (LES) and CPF published publicity.

b) Contacts BEST at 1-800-997-2378 (or commercial 527-2378 if calling within the San Antonio area) with questions.

c) Makes election through the BEST automated phone system or the EBIS web system (located at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). If unable to access the BEST automated phone system, contacts the CPF who will contact AFPC/DPCMB for assistance. If unable to access EBIS due to problems with creating the UserID or password, contacts the AFPC Technical Assistance Center for assistance. Telephone numbers for contacting the Technical Assistance Center are located on the EBIS Log-On page. For questions concerning selections within the EBIS system, employees should contact BEST at numbers above.

d) Reviews LES to ensure election is correct. LES serves as official notification of TSP election. Employee **does not** receive a copy of the TSP-1.

e) Reviews semi-annual participant's statement.

2) CPF Action:

a) Refers all TSP questions to AFPC/DPCMB.

b) Refers employee to the BEST automated phone system or EBIS, which is located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm, to make the election. If the employee is unable to access the system, due to late or erroneous accession coding, contacts the appropriate AFPC Staffing Team for resolution of the accession error. Provides the employee name, SSN, and telephone number to AFPC/DPCMB for contact with the employee to determine if a counselor-assisted, on-line enrollment is necessary.

c) Publishes Open Season information via the base newsletter, newspaper, email, or other base media. CPFs may use and tailor benefits guidance published by BEST.

3) AFPC/DPCMB Action:

a) Prior to the beginning of the open season, runs a TSP Quality Control Update DESIRE for CSRS employees having a blank TSP Agency Contribution Eligibility Date data element. (Note: The BEST automated system edits use this data element to determine which employees are eligible to make an open season election.) Prepares TSP Newly Eligible Notices for each newly eligible employee. The letters will be forwarded to employees at their home addresses. A separate Quality Control DESIRE is run to ensure FERS employees have a date in TSP Agency Contribution Eligibility Date.

b) Provides open season publicity for CPFs to modify and publish as appropriate.

c) Provides advisory service to employees.

d) Contacts employee regarding access problem. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated systems.

e) Relies on IVRS/EBIS/Modern DCPDS interface update to DFAS.

f) Provides PARIS an electronic data stream to populate TSP-1.

c. TSP Loan Program:

1) Employee Action:

a) Contacts BEST, TSP Service Office, or <http://www.tsp.gov> with questions.

b) Contacts TSP Service Office, <http://www.tsp.gov>, or unit Organizational Representative for Loan Application (TSP-20) and Loan Program Booklet (TSPBK04). The telephone number for the TSP Service Office is (504) 255-6000. The TDD number is (504) 255-5113.

c) Completes Loan Application and forwards to TSP Service Office at the following address: TSP Service Office, National Finance Center, P.O. Box 61500, New Orleans LA 70161-5113.

d) Resolves loan repayment issues with the local Civilian Payroll Liaison or appropriate DFAS Service Center.

2) CPF Action:

a) Refers all TSP questions to AFPC/DPCMB. Specific loan questions should be referred to the TSP Service Office or <http://www.tsp.gov>.

b) Refers employee to the unit Organizational Representative, TSP Service Office, or <http://www.tsp.gov> for Loan Application (TSP-20) and Loan Program Booklet (TSPBK04).

c) Instructs employee to send Loan Application directly to TSP Service Office.

d) Completes TSP-19, Transfer of Thrift Savings Plan Information Between Agencies, for transferring-in employees who have an outstanding TSP loan. Obtains information necessary for completing TSP-19 from the employee during in-processing.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Refers employee to the unit Organizational Representative, TSP Service Office, or <http://www.tsp.gov>, for Loan Application Form (TSP-20) and booklet "Loan Program" (TSPBK04).

c) Forwards Loan Application to TSP Service Office when erroneously sent to AFPC/DPCMB.

d) Refers employee to TSP Service Office's ThriftLine regarding status of loan request. The ThriftLine telephone number is (504) 255-8777.

e) Refers employee to <http://www.tsp.gov> for other loan information.

d. TSP In-Service Withdrawals

1) Employee Action:

a) There are two types of in-service withdrawals: age-based, and financial hardship. Employees with questions may contact BEST or the TSP Service Office, or visit the TSP web site at <http://www.tsp.gov>. The TSP Service Office phone number is (504) 255-6000 (TDD 504-255-5113). The TSP Service Office's mailing address is: TSP Service Office, National Finance Center, P.O. Box 61500, New Orleans LA 70161-1500.

b) Contacts TSP Service Office, <http://www.tsp.gov>, or the unit Organizational Representative for TSP In-Service Withdrawals (TSP Book 12), Age-Based In-Service Withdrawal Request (Forms TSP 75/75T), or Financial Hardship In-Service Withdrawal (Forms TSP 76 and 75T).

c) Completes applicable in-service withdrawal request and forwards to the TSP Service Office.

d) Contacts the TSP Service Office or the ThriftLine regarding status of in-service withdrawal request. The ThriftLine's telephone number is (504) 255-8777.

e) Employees who receive a financial hardship in-service withdrawal may not make TSP contributions for six months. The six-month period begins on the 46th day after the withdrawal is disbursed by the TSP Service Office. Prior to the expiration of the six-month period, employees will receive an eligibility letter from the TSP Service Office advising they are eligible to resume employee contributions. To resume contributions, employees should fax a copy of the TSP eligibility letter to BEST at DSN 665-2936 (or commercial 210-565-2936) with a request to resume contributions. Include a commercial phone number with area code in the request. A benefits counselor will call the employee and assist with the enrollment. BEST will not accept hard copy TSP-1 forms.

2) CPF Action:

a) Refers all TSP questions to BEST, the TSP Service Office, or <http://www.tsp.gov>.

b) Refers employee to the TSP Service Office, <http://www.tsp.gov>, or the unit Organizational Representative for TSP In-Service Withdrawals (TSP Book 12), Age-Based In-Service Withdrawal Request (Forms TSP 75/75T), and Financial Hardship In-Service Withdrawal (Forms TSP 76 and 75T).

c) Instructs employee to send TSP In-Service Withdrawal Request directly to the TSP Service Office.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Refers employee to the unit Organizational Representative, the TSP Service Office, or <http://www.tsp.gov> for TSP In-Service Withdrawals (TSP Book 12); Age-Based In-Service Withdrawal Request (Forms TSP 75/75T); and Financial Hardship In-Service Withdrawal (Forms TSP 76 and 75T).

c) Forwards TSP In-Service Withdrawal Requests to the TSP Service Office when they are erroneously sent to BEST.

d) Refers employee to the TSP Service Office's ThriftLine regarding status of in-service withdrawal request. The ThriftLine's telephone number is (504) 255-8777.

e) Upon receipt from TSP Service Office, processes Non-Contribution Notice (Form TSP-967-AO) by updating Modern DCPDS, forwarding copies to payroll and the employee, and scanning into PARIS.

f) Receives employee request to resume TSP contributions after 6 month non-contribution period, with copy of TSP eligibility letter. Verifies employee is eligible to resume contributions. Calls employee and prepares a counselor-assisted, on-line enrollment for employees who are eligible. If not eligible, explains to employee why not.

e. Stopping TSP Contributions:

1) Employee Action:

a) Contacts BEST with questions.

b) Makes election through the BEST automated phone system or EBIS (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). If unable to access the BEST automated phone system, contacts the CPF who will contact AFPC/DPCMB for assistance. If unable to access the EBIS web system due to problems with creating UserID or password, contacts the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting the Technical Assistance Center are located on the EBIS Log-On page. For questions concerning selections within EBIS, contacts BEST at 1-800-997-2378 (or commercial 527-2378 if calling within the San Antonio area).

c) Reviews Leave and Earnings Statement (LES) to ensure election is correct. LES serves as official notification of TSP election. Employee **does not** receive a copy of the TSP-1.

d) Reviews semi-annual participant's statement.

2) CPF Action:

a) Refers all TSP questions to AFPC/DPCMB.

b) Refers employee to the BEST automated phone system or EBIS (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make the election. If the employee is unable to access the systems, provides the employee's name, SSN, and telephone number to AFPC/DPCMB for contact with the employee.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Contacts employee regarding access problems. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated systems. Counselor updates Modern DCPDS and scans document into PARIS.

c) Relies on IVRS/EBIS/Modern DCPDS interface update to DFAS.

d) Provides PARIS an electronic data stream to populate TSP-1.

f. TSP Out-Processing:

1) Employee Action:

a) Reviews the TSP Withdrawal Package that is obtained from the CPF.

b) Contacts BEST or TSP Service Office for assistance. The TSP Service Office phone numbers are (504) 255-6000, and TDD (504) 255-5113.

c) Forwards withdrawal election directly to the TSP Service Office for processing. The TSP Service Office's mailing address is: TSP Service Office, National Finance Center, P.O. Box 61500, New Orleans LA 70161-1500.

2) CPF Action:

a) Provides TSP out-processing materials to CSRS and FERS employees separating from Federal service or refers employees to the TSP web site at <http://www.tsp.gov/forms>. TSP out-processing materials are listed in the Out-Processing Procedures, Section 3, of this chapter.

b) Provides employees entering a leave without pay (LWOP) status the handout "Benefits Summary for Employees on Leave Without Pay (LWOP)" located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

c) Provides employees entering a LWOP status to enter **military** service, including ART employees, the handout "Information for Employees Entering Military Active Duty", located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

d) Refers all questions regarding withdrawal to AFPC/DPCMB, TSP Service Office, or <http://www.tsp.gov>.

3) AFPC/DPCMB Action: Provides advisory service.

g. TSP - Employees Returning from Military Duty (USERRA)

1) Employee Action:

a) Contacts BEST for advisory service (1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area).

b) Obtains document "Information for Employees Returning From Military Active Duty", available on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>. The document may also be obtained by calling the BEST automated phone system, entering the fax module, and requesting fax-back document #0104.

c) Faxes signed statement to BEST requesting to make-up contributions. Requests must be received at BEST within one year of restoration to duty from active military service. The request will also include a copy of the military orders and a completed TSP-1, Thrift Savings Plan Election Form, if the employee missed a TSP Open Season in which he/she either wanted to elect to participate for the first time, or wished to make a change in the amount and/or allocation of contributions. Requests for make-up contributions may be faxed to BEST at DSN 665-2936 (or commercial 210-565-2936), or mailed to AFPC/DPCMB, 550 C Street West Ste 57, Randolph AFB TX 78150-4759.

2) **CPF Action:** Refers employees with questions to AFPC/DPCMB.

3) **AFPC/DPCMB Action:**

a) Provides advisory service to employees.

b) Processes appropriate paperwork for make-up contributions to DFAS. Scans copy of all related documents into PARIS.

4) **DFAS Action:**

a) Calculates Agency Automatic (1%) contribution for retroactive period.

b) Calculates amount of make-up contributions, agency matching contributions (if applicable), etc.

c) Notifies eligible employees of their TSP make-up contributions and assists employee to initiate a payment schedule.

h. Modern DCPDS Reports (formerly Report on Individual Persons (RIPs))

1) Benefits-related reports have not been updated to reflect regionalized servicing. AFPC/DPCMB attempted to change the wording but has been unsuccessful due to a moratorium on changes.

2) **CPF Action:** Refer to following guidance for Modern DCPDS reports until further notice:

- TSP01 - Thrift Savings Plan (TSP) Update Required. Destroy. AFPC/DPCMB responsibility.
- RPTSP - Eligibility for Thrift Savings Plan Letter. Destroy. At the beginning of each TSP open season, AFPC/DPCMB provides a letter to each newly eligible employee.
- RTSP1 – Thrift Savings Plan Code Status. Destroy.

3) **AFPC/DPCMB Action:**

a) Provides advisory service to employees.

b) Provides notice letters to employees newly eligible to contribute to TSP prior to each open season. This replaced RPTSP - Eligibility for Thrift Savings Plan Letter report.

i. Return to Duty (RTD) from Leave Without Pay (LWOP)

1) Employee Action:

a) Contacts BEST with questions.

b) Reviews LES to ensure TSP contributions resumed. This applies to all employees returning to a pay and duty status from LWOP, as long as they did not submit an election through the BEST automated phone system or EBIS to stop their contributions.

c) Employees returning to a pay and duty status from LWOP for active military service should obtain the handout "Information for Employees Returning from Military Active Duty" from the CPF or from the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

d) Employees returning to duty from LWOP for active military service who wish to make retroactive TSP contributions for the time on LWOP should refer to paragraph g above.

2) **CPF Action:** Refers employees with questions to AFPC/DPCMB.

3) **AFPC/DPCMB Action:** Provides advisory service.

5. Federal Employees' Health Benefits (FEHB)

a. FEHB Program Information:

1) Employee Action:

a) Obtains RI 70-1, "Guide to Federal Employees Health Benefits Plan," and carrier plan brochures from appropriate source according to local procedures: Civilian Personnel Flight, Organizational Representative, or <http://www.opm.gov/insure/02/index.html>. Temporary employees obtain RI 70-8, "Guide to FEHB for Certain Temporary Employees."

b) Reviews program information and makes personal decisions.

c) Obtains copy of most recent SF 2809, Health Benefits Registration Form, including pending transactions, through the BEST automated phone system fax-back feature. With the exception of pharmacies, the form may be used in lieu of the membership identification card until the card(s) arrive in the mail.

2) CPF Action:

a) Determines local procedures for maintaining reference copies of the guides, plan brochures, and carrier 1-800 numbers.

- b) Maintain at CPF or with each unit Organizational Representative.
- c) Notifies employees of local procedures for obtaining FEHB guides and plan brochures.
- d) Refers employees to appropriate sources for guide(s) and carrier plan brochures.

3) **AFPC/DPCMB Action:** Refers employees to their Civilian Personnel Flight for local procedures on how to obtain the guide(s) and plan brochures. Advises employees the guide(s) and plan brochures are also available for review and/or download from the OPM web site at <http://www.opm.gov/insure/health/index.htm>.

b. Health Benefits Accession Procedures

1) Employee Action:

- a) Reviews accession package information provided by CPF and follows instructions.
- b) Contacts BEST with questions (1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area).
- c) Makes election through the BEST automated phone system or EBIS web application (located at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm).

(1) If using the BEST automated phone system, employees electing self and family coverage must make their election between 7:00 a.m. and 7:00 p.m., Monday through Friday, Central Standard Time (CST). Once the employee has input their dependents social security number, date of birth, relationship, sex, and zip code, the system will automatically transfer the employee to a benefits counselor to capture the names of the employee's dependents. In addition, employees who have other health insurance coverage (such as Medicare, Champus/Tricare, or other group coverage) and who desire to enroll via the BEST automated phone system must do so between 7:00 a.m. and 7:00 p.m., Monday through Friday, Central Standard Time. The system will transfer these employees to a benefits counselor to capture the "other" health insurance coverage data.

(2) Employees may make self and family elections in EBIS without counselor assistance. However, employees with more than 10 dependents must use the BEST automated phone system to accomplish the enrollment. Employees with "other" health insurance coverage may conduct their enrollment in EBIS without counselor assistance.

d) If employee is unable to access the BEST automated phone system, contacts the CPF for assistance. If unable to access the EBIS web system due to problems creating the UserID or password, contacts the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting the Technical Assistance Center are located on the EBIS Log-On page.

e) For issues associated with accession data in Modern DCPDS (i.e., late or erroneous accession coding, SF 75 information not transferring), contacts CPF with questions.

f) Reviews Leave and Earnings Statement (LES) to ensure election is correct.

g) Obtains copy of most recent SF 2809, Health Benefits Registration Form, including pending transactions, through the BEST automated phone system fax-back feature. With the exception of pharmacies, the form may be used in lieu of the membership identification card until the card(s) arrive in the mail from the carrier.

2) **CPF Action:**

a) Refers advisory questions from employees to AFPC/DPCMB.

b) For issues associated with accession data in Modern DCPDS (i.e., late or erroneous accession coding, SF 75 information not transferring), contacts respective AFPC Staffing Team for resolution of the **accession** problem. Also provides the employee's name, SSN, and telephone number to AFPC/DPCMB for contact to determine if a counselor-assisted, on-line enrollment is necessary.

c) Provides FEHB handouts "Federal Employees Health Benefits (FEHB) Overview" and "Permissible Events to Change Coverage" to employees or refers them to the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm> to obtain.

d) Refers employee to the BEST automated phone system or EBIS web system (located at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make the election. If employee is unable to access the BEST automated systems due to late or erroneous accession data, contacts the appropriate AFPC Staffing Team for resolution of the **accession** problem. Provides the employee's name, SSN, and telephone number to AFPC/DPCMB for contact with the employee to determine if a counselor-assisted, on-line enrollment is necessary.

e) Prepares SF 2810, Notice of Change in Health Benefits Enrollment, for employees with health insurance transferring in from another agency or payroll office. Contacts the appropriate AFPC Staffing Team who has SF 75 information for the data to complete SF 2810, or obtains from employee if he/she has most recent LES. Forwards the carrier copy of SF 2810 directly to the carrier. Destroys the payroll office copy. Faxes OPF copy to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936 for profiling into PARIS.

f) Refers questions from employee to AFPC/DPCMB.

g) Refers employees to the appropriate base source and/or the OPM web site (<http://www.opm.gov/forms>) for the applicable FEHB guide(s) and plan brochures.

3) **AFPC/DPCMB Action:**

a) Provides advisory service.

b) Contacts employee regarding access problem. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated systems.

c) Relies on IVRS/EBIS/Modern DCPDS interface for updates to DFAS.

d) Mails SF 2809, Health Benefits Registration Form, to carrier.

e) Provides PARIS an electronic data stream to populate SF 2809.

f) Refers employee to BEST automated phone system to obtain copy of SF 2809.

4) AFPC Staffing Team Action:

a) Inputs the accession action to Modern DCPDS prior to the entry-on-duty (EOD) date, allowing eligible employees to elect their health insurance coverage in the BEST automated systems.

b) Reviews RPA to ensure FEHB remarks/coding data are included. Refers to list of critical FEHB data elements in the In-Processing Procedures section.

c) Relies on Modern DCPDS interface with DFAS for update – no Payroll hard copy necessary.

c. Health Benefits Open Season:

1) Employee Action:

a) Receives Open Season notification through Leave and Earnings Statement (LES) and CPF publicity.

b) Contacts BEST with questions (1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area).

c) Makes election through the BEST automated phone system or EBIS web application (locate at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm).

d) If unable to access the BEST automated phone system, contacts the CPF who will contact the appropriate AFPC office for assistance. If unable to access the EBIS web system due to problems creating the UserID or password, contacts the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page.

e) Reviews LES to ensure election is correct.

f) Obtains copy of most recent SF 2809, Health Benefits Registration Form, including pending transactions, through the BEST automated phone system fax-back feature. With the exception of pharmacies, the form may be used in lieu of membership identification card until the card(s) arrive in the mail from the carrier.

2) CPF Action:

- a) Refers all Federal Employees Health Benefits (FEHB) questions to AFPC/DPCMB.
- b) Publishes Open Season information via the base newsletter, newspaper, email, or other base media.
- c) Provides notice to employees that the RI 70-1, Guide to Federal Employee Health Benefits Plans and carrier plan brochures are available through the OPM web site at <http://www.opm.gov>, or through the appropriate base source; i.e., the CPF or unit Organizational Representative.
- d) Refers employee to the BEST automated phone system or EBIS web application (located at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make election. If the employee is unable to access the BEST systems due to late or erroneous accession coding, contacts the respective AFPC Staffing Team for resolution of the **accession** problem. If the employee has questions or problems creating the UserID or password within EBIS, he/she should contact the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. If the employee is unable to access the BEST systems, provides the employee's name, SSN, and telephone number to AFPC/DPCMB for contact to determine if a counselor-assisted, on-line enrollment is necessary.

3) AFPC/DPCMB Action:

- a) Provides open season publicity for CPFs to modify and publish as appropriate.
- b) Provides advisory service.
- c) Contacts employees regarding access problems. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated systems. However, the transaction will not be processed until BEST is able to verify the employee's eligibility to make the transaction.
- d) Relies on IVRS/EBIS/Modern DCPDS interface to update DFAS.
 - (1) Mails SF 2809, Health Benefits Registration Form, to carrier.
 - (2) Provides PARIS an electronic data stream to populate SF 2809.
- e) Refers employee to BEST automated phone system to obtain copy of SF 2809.

d. FEHB Non-Open Season Changes: (Marriage, Birth, Etc.)

1) Employee Action:

a) Contacts BEST with questions (1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area).

b) Makes election through the BEST automated phone system or EBIS web application (located at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). If unable to access the BEST automated phone system, contacts the CPF who will contact AFPC for assistance. If unable to access the EBIS web system due to problems creating UserID or password, contacts the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. Directs questions concerning selections within EBIS to AFPC/DPCMB.

c) Makes the following non-open season changes through the BEST automated systems:

- Change from self and family to self only (must have qualifying life event).
- Change in family status. Includes marriage, birth, death of a family member, adoption, legal separation, or divorce.
- Employee or family member moves from an area served by a prepaid plan in which enrolled at time of move.
- Employee transfers to overseas post of duty from the United States or reverse.
- Temporary employee eligible under 5 USC 8906a changes to a non-temporary appointment.
- Temporary employee who has completed one year of continuous employment.

d) For FEHB transactions that cannot be accomplished through the BEST automated systems, employee presses "0" to transfer to a benefits counselor from within the FEHB module of the phone system. The benefits counselor will prepare a counselor-assisted, on-line transaction.

e) Upon request, provides BEST proper documentation to support change. Employees are responsible for validity of changes. Fraudulent changes may result in disciplinary action.

f) Obtains most recent copy of SF 2809, Health Benefits Registration Form, including pending transactions, through the BEST automated phone system fax-back feature. With the exception of pharmacies, the form may be used in lieu of membership identification card until the card(s) arrive in the mail from the carrier.

g) Reviews Leave and Earnings Statement (LES) to ensure election is correct.

h) Contacts carrier to report a name change, providing documentation requested by carrier. If carrier will not accept the name change in this manner, employee should contact BEST for SF 2810.

i) Contacts carrier to add or delete family members if there is NO change in the enrollment code.

2) CPF Action:

a) Refers FEHB questions to AFPC/DPCMB.

b) Refers employee to the BEST automated phone system or EBIS web application to make the election. If the employee is unable to access the phone system, provides the employee's name, SSN, and telephone number to AFPC/DPCMB for assistance. If unable to access EBIS due to problems creating UserID or password, contacts the AFPC Technical Assistance Center for assistance. Phone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page.

c) Upon referral by AFPC/DPCMB, investigates fraudulent changes/elections and determines if disciplinary action is warranted for falsification of a personnel document.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Contacts employee regarding access problem. Solves the access problem if not related to late or erroneous accession coding. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated systems. However, the transaction will not be processed until BEST is able to verify the employee's eligibility to make the transaction.

c) Relies on IVRS/EBIS/Modern DCPDS interface with DFAS for update.

(1) Mails SF 2809, Health Benefits Registration Form, to carrier.

(2) Provides PARIS an electronic data stream to populate SF 2809.

d) Refers employee to BEST automated phone system to obtain copy of SF 2809.

e) Conducts 10% audit ensuring employees provide proper documentation to support FEHB changes.

f) Refers suspected fraudulent changes/elections to the servicing CPF for investigation and determination if disciplinary action is warranted for falsification of a personnel document. Provides documentation/testimony as required/needed.

g) Refers employees to the carrier to report a name change. However, BEST will provide SF 2810 if the carrier will not accept the name change without one.

h) Refers employees to the carrier to add or delete family members if there is NO change in enrollment code.

e. FEHB Termination/Cancellation:

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Makes election through the BEST automated phone system or EBIS, which is located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm. If unable to access the BEST automated phone system, contacts the CPF for assistance. If unable to access EBIS due to problems creating the UserID or password, contacts the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. Contacts BEST with questions concerning making selections within EBIS.

c) Obtains most recent copy of SF 2809, Health Benefits Registration Form, including pending transactions, through the BEST automated phone system fax-back feature.

d) Reviews Leave and Earnings Statement (LES) to ensure election is correct.

2) CPF Action:

a) Refers all FEHB questions to AFPC/DPCMB.

b) Refers employee to the BEST automated phone system or EBIS (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make the election. If the employee is unable to access the BEST automated phone system, provides the employee's name, SSN, and telephone number to AFPC/DPCMB for contact with the employee. If employee has questions or problems regarding creating the UserID or password in EBIS, he or she should contact the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. Refers employees to BEST for help with making selections within EBIS.

3) AFPC/DPCMB Action:

a) Provides advisory service to employee.

b) Contacts employee regarding access problem. Solves if the problem is not related to late or erroneous accession coding. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated systems.

(1) Relies on IVRS/EBIS/Modern DCPDS interface to update DFAS.

(2) Mails SF 2809, Health Benefits Registration Form, to carrier.

c) Provides PARIS an electronic data stream to populate SF 2809.

d) Refers employee to BEST automated phone system to obtain copy of SF 2809.

f. FEHB and Leave Without Pay (LWOP)

1) Employee Action:

a) If entering a leave without pay (LWOP) status, obtains the Benefits Summary for Employees on Leave Without Pay (LWOP) from the CPF or the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

(1) Completes the Federal Employees Health Benefits (FEHB) Options While in Non-Pay Status Letter (FEHB LWOP Election) and forwards to BEST. Employee may fax to DSN 665-2936 or (210) 565-2936, or mail to the address on the letter.

(2) If employee does not return the FEHB LWOP Election to BEST, the employee's health coverage will continue during the period of LWOP and the employee will incur a debt for that coverage.

b) If entering a LWOP status to enter **military** duty, obtains the handout "Information for Employees Entering Military Active Duty" from the CPF or from the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>. Completes the election form and provides to the CPF with RPA and a copy of military orders.

c) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

2) CPF Action:

a) Provides employees entering a leave without pay (LWOP) status the handout "Benefits Summary for Employees on Leave Without Pay (LWOP)." The handout can be found on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>. Faxes the employee's completed Federal Employees Health Benefits (FEHB) Options while in Non-Pay Status Election Form to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936.

b) For employees who will be in a LWOP status to enter **military** duty, including ART employees, provide the handout "Information for Employees Entering Military Active Duty", located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>. Upon receipt of the employee's completed Election Form and military orders, fax to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936.

c) If LWOP is due to Federal Employee's Compensation Act (FECA), refer to Chapter XIV, Section 15, Workers Compensation.

d) Refers employees with questions to AFPC/DPCMB.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Receives LWOP Election Letter:

(1) If employee elects to terminate FEHB coverage, prepares SF 2810, Notice of Change in Health Benefits Enrollment, terminating coverage, inputs to Modern DCPDS, and forwards SF 2810 to the employee and the carrier. Scans SF 2810 and Termination Election Letter into PARIS as permanent OPF documents.

(2) If employee elects to pay premiums or to incur a debt, forwards a copy of election to DFAS for information, and scans into PARIS.

c) Prepares SF 2810 to terminate FEHB when employee has been in a LWOP status for 12 months. For employees who entered a LWOP status to enter active military service, terminates FEHB coverage after 18 months in a nonpay status (if employee currently paid his/her premiums during the last 6 of the 18 months). Inputs to Modern DCPDS, relying on interface to update DFAS. Forwards SF 2810 to employee and directly to carrier. Scans SF 2810 into PARIS.

g. FEHB Out-Processing Procedures:

1) Employee Action:

a) Reads SF 50 remark regarding temporary continuation of coverage (TCC).

b) If terminating Federal employment, obtains and reviews the booklet "Temporary Continuation of Coverage Under the Federal Employees Health Benefits Program" (RI 79-27) from the CPF. The booklet may also be reviewed or downloaded from the OPM web site at http://www.opm.gov/insure/health/hr_pubs.htm.

c) If interested in enrolling in TCC, obtains information and instructions about how to file by calling the BEST automated phone system and requesting fax-back document #1002, or by visiting the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm> and selecting "Temporary Continuation of Coverage (TCC)". Employees who need assistance should contact BEST **prior** to separation. (Note: Once the employee separates, he or she is no longer able to access the BEST automated phone system. After separation, employees may contact BEST by calling 1-800-540-4047 (or commercial 527-2399 in the San Antonio area). Separated employees may also obtain information by accessing the above web sites. Employees file their TCC enrollment forms with BEST. BEST will process and forward to the National Finance Center. Employees may then contact the National Finance Center directly at 1-800-242-0630 for information regarding their enrollment.

d) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

e) Contacts carrier regarding questions on individual contracts.

f) If entering a leave without pay (LWOP) status, obtains the "Benefits Summary for Employees on Leave Without Pay (LWOP)" from the CPF or from the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

(1) Employee completes the Federal Employees Health Benefits (FEHB) Options While in Non-Pay Status Letter (FEHB LWOP Election) and forwards to BEST. Employee may fax to DSN 665-2936 or (210) 565-2936, or mail to the address on the letter.

(2) If employee does not return the FEHB LWOP election to BEST, the employee's health coverage will continue during the period of LWOP and the employee will incur a debt for that coverage.

g) If entering a LWOP status to enter on **military** duty, obtains the handout "Information for Employees Entering Military Active Duty" from the CPF or from the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>. Completes the election form and provides to the CPF with SF 52/RPA and a copy of military orders.

2) CPF Action:

a) Prepares SF 2810, Notice of Change in Health Benefits Enrollment, for employees with health insurance who are terminating Federal employment (except by retirement or death). Provides the original to the employee with the instruction sheet. Forwards carrier copy directly to the carrier. Faxes the OPF copy to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936 for profiling into PARIS.

b) For employees with health insurance who are terminating Federal employment, provides the booklet "Temporary Continuation of Coverage under the Federal Employees Health Benefits Program" (RI 79-27). May also refer employees to the OPM web site at http://www.opm.gov/insure/health/hr_pubs.htm to review or download RI 79-27.

c) If employee is interested in temporary continuation of coverage (TCC), encourages employee to contact the BEST **prior to separation** to obtain fax-back document #1002. The employee may also obtain the handout "Temporary Continuation of Coverage (TCC)" from the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm>. Once the employee separates, he or she will be unable to access the BEST automated phone system. **After separation**, advises employees to contact the BEST at 1-800-540-4047 (or commercial 527-2399 in the San Antonio area), or the AFPC DPC web site at the above web address.

d) Provides employees entering a LWOP status the handout "Benefits Summary for Employees on Leave Without Pay (LWOP)" located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>. Faxes the employee's Federal Employees Health Benefits (FEHB) Options while in NonPay Status election form to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936.

e) For employees entering a LWOP status to enter **military** duty, including ART employees, provides the handout "Information for Employees Entering Military Active Duty" (located at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>). Upon receipt of the completed election form and military orders from the employee, faxes to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936.

3) AFPC Action:

- a) AFPC/DPCMB provides advisory service.
- b) AFPC Staffing Team places temporary continuation of coverage (TCC) remark on SF 50.
- c) AFPC/DPCMB processes TCC request to National Finance Center (NFC).
 - (1) NFC notifies carriers.
 - (2) NFC bills individual for premium payments.
 - (3) NFC maintains TCC files.
- d) AFPC/DPCMB processes employee's LWOP election. If employee elected to terminate coverage, prepares SF 2810 and forwards copy directly to the carrier. Scans LWOP election letter and SF 2810 into PARIS. If employee elects to continue coverage or incur a debt during LWOP, send copy of election to DFAS and scans into PARIS. Also scans military orders, where applicable.

h. Former Spouses/Children Who Lose Coverage

1) **Former Spouse/Children Action:** Obtains the Temporary Continuation of Coverage (TCC) document by contacting BEST at 1-800-540-4047 (commercial 527-2399 if in the San Antonio area) or by visiting the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm>. TCC coverage must be requested within 60 days of the qualifying event and is accomplished by following directions provided in the TCC document.

2) CPF Action:

- a) Refers questions to AFPC/DPCMB.
- b) Refers former spouses and/or children to the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm> to obtain the "Temporary Continuation of Coverage (TCC)" handout, or provides them a hard copy of the document. Former spouses/children may also contact BEST at 1-800-540-4047 (commercial 527-2399 if in the San Antonio area) for the TCC handout.

3) AFPC/DPCMB Action:

- a) Provides advisory service.
- b) Refers former spouses/children to the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm> to obtain the TCC handout, or faxes it to them.
- c) Processes election request to the National Finance Center (NFC).

- (1) NFC notifies carriers.
- (2) NFC bills individual for premium payments.
- (3) NFC maintains TCC files.

i. Modern DCPDS Reports (formerly Report on Individual Person (RIPs))

1) Benefits-related reports have not been updated to reflect regionalized servicing. AFPC/DPCMB attempted to change the wording but has been unsuccessful due to a moratorium on changes.

2) **CPF Action:** Refer to the following guidance for Modern DCPDS reports until further notice:

- FEHB1 - Notice of Change in Health Benefits Enrollment. Destroy. No longer needed.
- FEHBT - Last Notice Named Temporary Employee May Now Be Eligible for Health Benefits. Destroy. AFPC/DPCMB is working on a replacement. Until then, provide the handout “Benefits Summary for New Civilian Employees” to temporary employees converting to a permanent appointment, and to temporary employees whose appointment has been extended past one year.
- RP-614 - FEHB (Health Insurance) Follow-Up Notice. Destroy. Provide the handout “Benefits Summary for New Civilian Employees” to new employees or employees converting from a temporary to a permanent appointment.
- RP-615 - Notice of Expiration of FEHB Dependency. Destroy. AFPC/DPCMB is working on a replacement.
- XFEHB - FEHB Expiration. Destroy. OPM no longer requires documentation that employee failed to elect FEHB.

3) **AFPC/DPCMB Action:**

(a) Provides notice of eligibility to enroll in FEHB to temporary employees whose appointment has been extended past one year.

(b) Provides advisory service to employees.

j. Foster Children

1) **Employee Action:**

a) Contacts BEST with questions.

b) Employees who have **self only** coverage must make the election to add a foster child (and change to self and family) by calling the BEST automated phone system, entering the FEHB module, and pressing “0” to transfer to a counselor. Employees who already have **self and**

family coverage may add a foster child using either the BEST phone system or the EBIS web application (http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). Note: EBIS will not allow the foster child to be enrolled if the employee has not submitted the Statement of Foster Child to BEST.

c) Employees adding a foster child to their enrollment by either the BEST automated phone system or EBIS must provide a “Statement of Foster Child” to BEST. The statement may be obtained from the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/fehb.htm>, or by calling the BEST automated phone system and requesting fax-back document #1004.

d) Upon request, provides BEST proper documentation to support the election. Employees are responsible for validity of changes. Disciplinary action may be taken upon discovery of fraudulent change.

2) **CPF Action:**

a) Refers all FEHB questions to AFPC/DPCMB.

b) Refers employees to the BEST automated phone system or to EBIS to make the election due to acquisition of a foster child.

c) Upon referral by AFPC/DPCMB, investigates fraudulent elections and determines if disciplinary action is warranted for falsification of a personnel document.

3) **AFPC/DPCMB Action:**

a) Counsels employees regarding requirements for adding foster children to FEHB coverage.

b) Assists employees with the enrollment, preparing a counselor-assisted on-line transaction.

c) Relies on IVRS/EBIS/Modern DCPDS interface to update DCPS.

(1) Provides PARIS an electronic data stream to populate SF 2809.

(2) Forwards completed SF 2809 directly to carrier.

d) Refers employee to the BEST automated phone system’s fax-back feature to obtain copy of most recent SF 2809.

e) Refers fraudulent changes to the servicing CPF for investigation and determination if disciplinary action is warranted for falsification of a personnel document. Provides documentation and/or testimony as required.

k. Return to Duty (RTD) from Leave Without Pay (LWOP)

1) Employee Action:

a) Contacts BEST for advisory service.

b) Employees who terminated their enrollment upon entering LWOP, or whose enrollment terminated after 365 days of LWOP, have 60 days from returning to a pay and duty status to reenroll in health insurance. Employees may reenroll via EBIS or the BEST automated phone system. If the BEST automated phone system is used, the employee should enter the FEHB module and transfer to a benefits counselor for assistance. Employees who used the BEST automated phone system or EBIS to cancel their coverage may not reenroll until the next open season unless they have a qualifying life event.

c) Employees who entered in a LWOP status for **active military duty**. Upon returning to a pay and duty status from active military duty, FEHB will be automatically reinstated if the employee elected to terminate during LWOP or if coverage terminated after 18 months in LWOP status. Employees who elected to continue their coverage for a period of time and later *canceled* will not have their coverage restored upon return duty. Regardless of the employee's previous election to terminate or continue coverage, or the fact that health benefits coverage continued or was reinstated, these employees are eligible to make another health benefits election within 60 days of restoration to duty from LWOP. The election may be made through EBIS or the BEST automated phone system. If the BEST automated phone system is used, the employee should enter the FEHB module and transfer to a benefits counselor for assistance. Employees who used the BEST automated phone system or EBIS to cancel their coverage may not reenroll until the next open season unless they have a qualifying life event.

d) Review LES to ensure FEHB deductions resume, either upon return to duty from LWOP-US, or after making new election.

2) CPF Action:

a) Prepare SF 2810 reinstating the coverage of all employees returning to duty from LWOP-US who terminated their FEHB coverage or whose coverage was terminated due to 18 months in a LWOP status. This does not include those who cancelled their coverage, or those who elected to continue their coverage and then cancelled it. Forward the carrier copy of SF 2810 directly to the carrier, destroy the payroll office copy, and fax the OPF copy to BEST at DSN 665-2936 (or 210-565-2936).

b) Prepare RPA for reinstatement of all employees returning to duty from LWOP. However, for those employees returning from LWOP-US, the CPF must either code the reinstated FEHB coverage **or** annotate the Remarks section that FEHB Plan code ____ is to be reinstated, or that employee cancelled coverage and is not entitled to have FEHB reinstated.

c) Refers employees with questions to AFPC/DPCMB.

3) AFPC Staffing Team Action:

a) Ensures FEHB enrollment code is input into Modern DCPDS when processing the RTD RPA for an employee returning from LWOP-US, if RPA so indicates. Updates data

element “Date FEHB Eligibility Expires” so employee may make another election within 60 days of restoration.

b) For employees returning to duty from regular LWOP, ensures appropriate FEHB data elements, including Date FEHB Eligibility Expires, are updated so that employee may elect FEHB coverage within 60 days of restoration.

4) AFPC/DPCMB Action:

a) Provides advisory service.

b) Prepares a counselor-assisted, on-line enrollment for employees electing to reenroll after returning to a pay and duty status after 365 days of LWOP, or after 18 months if on LWOP for active military duty.

c) Relies on IVRS/EBIS/Modern DCPDS interface to update DCPS.

(1) Provides PARIS an electronic data stream to populate SF 2809.

(2) Forwards completed SF 2809 directly to carrier.

6. Federal Employees’ Group Life Insurance (FEGLI)

a. FEGLI Accession Procedures:

1) Employee Action:

a) Reviews accession package information provided by the CPF and follows instructions.

b) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

c) Makes election through BEST automated phone system or EBIS web system (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). If unable to access the BEST automated phone system, contacts the CPF who will contact the appropriate AFPC office for resolution. If employee has problems or questions creating the UserID or password within EBIS, contacts the AFPC Technical Assistance Center for assistance. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. Contacts BEST with questions regarding selections within EBIS.

d) For issues associated with late accession data in Modern DCPDS (i.e., late or erroneous accession coding, SF 75 information not transferring), contacts CPF with questions.

e) Reviews Leave and Earnings Statement (LES) to ensure election is correct. LES serves as official notification of FEGLI election. BEST does not provide employee a copy of the SF 2817, Life Insurance Election.

2) CPF Action:

- a) Refers advisory questions from employee to AFPC/DPCMB.
- b) Provides eligible employees the RI 76-21, Federal Employees Group Life Insurance (FEGLI) Program Booklet; the SF 2823, FEGLI Designation of Beneficiary Form, or refers employees to the OPM web site at <http://www.opm.gov/insure/life/index.htm>.
- c) For issues associated with accession data in Modern DCPDS (i.e., late or erroneous accession coding, SF 75 information not transferring), the CPF contacts the servicing AFPC Staffing Team for resolution of the accession issue.
- d) Refers employee to the BEST automated phone system or EBIS web site to make the election. If the employee is unable to access the BEST automated phone system, provides the employee name, SSN, and telephone number to AFPC/DPCMB for contact to determine if a counselor-assisted, on-line transaction is necessary. However, if the problem is related to late or erroneous accession coding, the CPF contacts the servicing AFPC Staffing Team for resolution of the accession problem.
- e) Distributes SF 50s (Notification of Personnel Action) to employees.

3) AFPC/DPCMB Action:

- a) Provides advisory service.
- b) Contacts employee regarding access problems. Solves if not related to late or erroneous accession coding. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated phone system. The transaction will not be processed until the employee's eligibility to make the election is verified.
- c) Relies on IVRS/EBIS/Modern DCPDS payroll interface for DFAS update.
- d) Provides PARIS an electronic data stream to populate SF 2817, Life Insurance Election.
- e) Generates, authenticates, and profiles SF 50 into PARIS.

4) AFPC Staffing Team Action:

- a) Inputs the accession action to Modern DCPDS as close to the entry-on-duty (EOD) date as possible, thus allowing eligible employees to elect their life insurance coverage via the BEST automated phone system or EBIS web system.
- b) Reviews RPA to ensure FEGLI remarks/coding data are included. Ensures previous life insurance election resumes if employee had a break-in-service of less than 180 days and is eligible for coverage.

c) Relies on Modern DCPDS interface with DFAS for update – no payroll hard copy necessary.

b. Federal Employees Group Life Insurance Open Season:

1) Employee Action:

a) Receives Open Season notification through Leave and Earnings Statement (LES) and CPF publicity.

b) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

c) Contacts unit Organizational Representative or OPM web site at <http://www.opm.gov/insure/life/index.htm> for FEGLI Booklet, RI 76-21, if needed.

d) Makes election through the BEST automated phone system or EBIS, which is located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm. If unable to access the BEST automated phone system, contacts the CPF who will contact AFPC/DPCMB for assistance. If unable to access the EBIS web site due to problems creating the UserID or password, contacts the AFPC Technical Assistance Center for help. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. Contacts BEST with questions concerning selections within EBIS.

e) Reviews LES to ensure election is correct. LES serves as official notification of FEGLI election.

2) CPF Action:

a) Refers all FEGLI questions to AFPC/DPCMB.

b) Refers employees to the unit Organizational Representative or OPM web site at <http://www.opm.gov/insure/life/index.htm> for RI 76-21, FEGLI Booklet.

c) Refers employees to the BEST automated phone system or EBIS web system (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make the election. If the employee is unable to access the phone line, obtains the employee's name, SSN, and telephone number and provides to AFPC/DPCMB for assistance. If employee has questions/problems regarding creating the EBIS UserID or password, he/she should contact the AFPC Technical Assistance Center for help. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. If access problem is related to late or erroneous accession coding, the CPF will provide the employee's name, SSN, and telephone number to AFPC/DPCMB, and contact the servicing AFPC Staffing Team for resolution of the accession problem.

d) Distributes SF 50s to employees.

e) Publishes Open Season information via the base newsletter, newspaper, E-mail, or other base media.

3) AFPC/DPCMB Action:

a) Provides open season publicity for CPFs to modify and publish as appropriate.

b) Provides advisory service.

c) Refers employees to unit Organizational Representative or OPM web site at <http://www.opm.gov/insure/life/index.htm> for RI 76-21, FEGLI Booklet.

d) Contacts employee to determine and resolve access problems not related to late or erroneous accession coding. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST systems.

e) Relies on IVRS/EBIS/Modern DCPDS interface update to DFAS.

f) Provides PARIS an electronic data stream to populate SF 2817, Life Insurance Election.

g) Generates, authenticates, and profiles SF 50 into PARIS.

c. FEGLI Changes One Year After Valid Declination:

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Obtains SF 2822, Request for Insurance, from BEST.

c) Takes SF 2822 to physician and has required physical exam.

d) Ensures physician sends completed SF 2822 to the Office of Federal Employees Group Life Insurance (OFEGLI).

e) Receives notification from BEST of OFEGLI's approval or disapproval.

f) If approved, employee has 31 days from date of OFEGLI approval to call BEST to enroll.

g) Contacts BEST via the automated phone system, enters the FEGLI module, and presses "0" to transfer to a benefits counselor who will prepare an on-line transaction.

h) Reviews Leave and Earnings Statement (LES) to ensure election is correct. LES serves as official notification of FEGLI election. BEST does not provide employee a copy of the SF 2817, Life Insurance Election.

2) CPF Action:

- a) Refers all FEGLI questions to AFPC/DPCMB.
- b) Distributes SF 50s to employees.

3) AFPC/DPCMB Action:

- a) Provides advisory service.

(1) Advises employee of procedures when employee wishes to enroll in Basic Life, Option A, and/or Option B one year after valid declination.

(2) Ensures a valid declination is on file in the Official Personnel Folder (OPF) or PARIS for Basic Life and/or requested options.

(3) Completes Part A of the SF 2822 and mails to employee.

b) Advises employee whether OFEGLI approved or disapproved the request for insurance. If approved, advises the employee that he or she is allowed 31 days from the date of OFEGLI approval to enroll in the additional desired coverage. If the employee is not ready at that time to conduct the enrollment, advises employee to call back on the BEST automated phone system, select the FEGLI module, and press "0" to speak with a counselor.

- c) Prepares counselor-assisted, on-line transaction if approved by OFEGLI.

d) Generates, authenticates, and profiles SF 50 into PARIS. Relies on IVRS/DCPDS interface for updates to DFAS.

- e) Scans SF 2822 and SF 2817, Life Insurance Election, into PARIS.

d. FEGLI Changes (Marriage/Divorce/Death of Spouse/Acquisition of Child)

1) Employee Action:

- a) Contacts BEST with questions.

b) Makes election through the BEST automated phone system or the EBIS web site (located at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). If unable to access the BEST automated phone system, contacts the CPF who will contact AFPC/DPCMB for assistance.

c) Reviews Leave and Earnings Statement (LES) to ensure election is correct. LES serves as official notification of FEGLI change. BEST does not provide employee with copy of SF 2817.

d) Employees are responsible for validity of changes. Disciplinary action may be taken upon discovery of a fraudulent change.

e) Upon request, provides BEST proper documentation to support change. Failure to provide requested documentation may result in the FEGLI change being cancelled.

2) CPF Action:

a) Refers all FEGLI questions to AFPC/DPCMB.

b) Refers employees to the BEST automated phone system or EBIS web system (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make elections. If the employee is unable to access the system, obtains the employee's name, SSN, and telephone number and provides to AFPC/DPCMB for contact with the employee to determine if a counselor-assisted, on-line enrollment is necessary.

c) Investigates any fraudulent change/election referred by AFPC/DPCMB and determines if disciplinary action is warranted for falsification of a personnel document. Provides documentation/testimony as required/needed.

3) AFPC/DPCMB Action:

a) Provides advisory service. Advises employee of requirements/limits for multiples when employee wishes to enroll in Option B and/or Option C.

b) Refers employee to the unit Organizational Representative or the OPM web site at <http://www.opm.gov/insure/life/index.htm> for RI 76-21, FEGLI Booklet.

c) Relies on IVRS/EBIS/Modern DCPDS interface for updates to DFAS.

d) Provides PARIS an electronic data stream to populate SF 2817, Life Insurance Election.

e) Contacts employee regarding access problems. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST automated phone system.

f) Authenticates SF 50.

g) Conducts 100% audit of increased coverage elections ensuring employees provide proper documentation to support FEGLI changes.

h) Upon determination of a fraudulent election, changes the employee's election.

i) Refers fraudulent election cases to CPF for investigation and determination if disciplinary action is warranted. Provides documentation or testimony as required.

e. Court Orders:

1) Employee Action:

a) Submits via mail to BEST a **certified** copy of a court order where the court directed the employee to name a specific person or persons as beneficiary, or directed the employee to make an irrevocable assignment to the person(s) named in the court order, for filing in the OPF. Court orders may not be faxed.

b) BEST must receive prior to employee's death.

c) Court orders submitted prior to 22 July 1998 must be resubmitted to be valid for FEGLI purposes.

d) Contacts BEST with questions.

2) CPF Action:

a) Advises employee that court orders take precedence over and supersede any prior designations made by the employee, if filed with AFPC/DPCMB after 22 July 1998, but prior to the employee's death.

b) Encourages employee to mail a **certified** copy of court order to AFPC/DPCMB for filing in OPF.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Upon receipt of a **certified** court order (via mail), date stamps to show receipt.

c) Scans copy into administrative area of PARIS, "FLAG-FEGLI Court Order."

d) Forwards the original, **certified** court order to AFPC/DPCMP (OPF Management) for filing in the OPF.

e) Upon employee's death, forwards the original certified court order to OFEGLI along with other life insurance forms.

f) If employee submits SF 2823, Designation of Beneficiary, when he/she has a court order on file, DPCMB reviews to ensure it is completed properly, certifies receipt, scans copy into PARIS, and files original in OPF. Notifies the employee there is a court order on file and the designation may not be valid.

4) AFPC/DPCMP Action: Files original, certified copies of court orders in the OPF.

f. Accidental Dismemberment:

1) Employee Action:

- a) Notifies supervisor of accident immediately.
- b) Provides written notice of accident to the Office of Federal Employees Group Life Insurance (OFEGLI) within 20 days of accident. Notice may be a simple letter, signed by the employing agency, an interested friend, or the employee.
- c) Upon receipt of Form FE-7, Claim for Accidental Means Dismemberment Benefits, from BEST:
 - (1) Completes Part A.
 - (2) Attending physician completes Part C and provides medical reports.
- d) Forwards completed Form FE-7 to BEST within 90 days of date of loss.

2) Supervisor Action:

- a) Notifies CPF as soon as information is received.
- b) Provides name, address, and phone number of employee or employee's relative.

3) CPF Action:

- a) Refers all FEGLI questions to AFPC/DPCMB.
- b) Notifies AFPC/DPCMB with name, address, relationship, and telephone number of the next-of-kin.

4) AFPC/DPCMB Action:

- a) Provides advisory services.
- b) Contacts employee/relative by telephone.
- c) Provides employee with Form FE-7, Claim for Accidental Means Dismemberment Benefits.
- d) Upon receipt of completed Form FE-7 from employee, completes Part B – Certification of Insurance Status, and forwards claim to OFEGLI.
- e) Scans Form FE-7 into the administrative area of PARIS.

g. Voluntary Cancellation of FEGLI (Basic and/or Options):

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Makes election through BEST automated phone system or EBIS (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). If unable to access the BEST automated phone system, contacts the CPF who contacts AFPC/DPCMB for assistance. If unable to access the EBIS web site due to problems with creating the UserID or password, contacts the AFPC Technical Assistance Center for help. Telephone numbers and an E-mail link for contacting that office are located on the EBIS Log-On page. Contacts BEST with questions concerning selections within EBIS.

c) Reviews Leave and Earnings Statement (LES) to ensure election is correct. The LES serves as official notification of FEGLI election. BEST does not provide employee a copy of the SF 2817, Life Insurance Election.

2) CPF Action:

a) Refers all FEGLI questions to AFPC/DPCMB.

b) Refers employees to the BEST automated phone system or EBIS web system (located on the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) to make the election. If the employee is unable to access the phone system, provides the employee's name, SSN, and telephone number to AFPC/DPCMB for assistance.

c) Distributes SF 50s to employees.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Contacts employee to determine and resolve access problems. Prepares a counselor-assisted, on-line transaction if the employee can't make the election through the BEST systems.

c) Relies on IVRS/EBIS/Modern DCPDS interface update to DFAS.

d) Provides PARIS an electronic data stream to populate SF 2817, Life Insurance Election.

e) Authenticates SF 50.

h. FEGLI and Leave Without Pay (LWOP)

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) When FEGLI terminates after 12 months in a LWOP status, takes following actions:

(1) Upon receipt of SF 2819 and SF 2821 from BEST, reads/follows instructions on the SF 2819 and sends completed SF 2819 and SF 2821 to the Office of Federal Employees Group Life Insurance (OFEGLI) if desires to convert to a private policy.

(2) Upon receipt of Portability Notice from BEST (if eligible), reads and completes Portability Notice if desires to port (continue) Option B coverage.

(a) Portability Notice MUST be completed within 60 days of the terminating event.

(b) Mail or fax the completed Portability Notice to BEST at DSN 665-2936 or (210) 565-2936. It MUST be received by BEST not later than the 65th day after the terminating event (or by the 79th day if employee lives overseas). Also mails a copy to MetLife at the address on the notice.

2) **CPF Action:** Refers employee questions regarding FEGLI to AFPC/DPCMB.

3) **AFPC/DPCMB Action:**

a) Provides advisory service.

b) Runs DESIRE to identify employees approaching 12 months in a LWOP status.

(1) Provides Option B Portability Notice to eligible employees.

(2) Provides SF 2821 and SF 2819.

(3) Generates and authenticates SF 50 for FEGLI change.

(4) Scans SF 2821, SF 2819, and Portability Notice (if eligible) into PARIS.

c) Upon receipt of completed Portability Notice from employee, date stamps to show receipt.

(1) Verifies the employee completed the Portability Notice within 60 days of the terminating event.

(2) Verifies the Portability Notice was received by AFPC/DPCMB not later than the 65th day after the terminating event (or by the 79th day if the employee lives overseas).

(3) If Portability Notice is received within 65 days (CONUS) or 79 days (overseas), completes SF 2821 and forwards to MetLife within 60 days of receipt of the Notice. Include the Notice, and any designations, assignments, and court orders on file in the OPF.

(4) Scans the SF 2821, the Portability Notice, and any designations, assignments, and court orders into PARIS.

(5) If the Portability Notice was either not completed or not received within the specified time frames, notifies the employee he or she is not eligible to port Option B and scan into PARIS.

d) Scans completed SF 2821 and SF 2819 into PARIS.

i. FEGLI Out-Processing Procedures:

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Reads FEGLI conversion statement on the Clearance Sheet.

(1) Indicates on Clearance Sheet if planning to convert insurance.

(2) Contacts BEST prior to separation to obtain completed SF 2821, Agency Certification of Insurance Status, if planning to convert insurance. After separation, employee may access BEST by calling 1-800-540-4047 (or commercial 527-2399 in the San Antonio area).

c) Obtains SF 2819, Notice of Conversion Privilege, from CPF. Reads and follows instructions for conversion on the SF 2819.

d) Sends completed SF 2819 and SF 2821 to the Office of Federal Employees Group Life Insurance (OFEGLI), requesting a list of eligible insurance companies. If entering into a leave without pay status, obtains the handout "Benefits Summary for Employees on Leave Without Pay (LWOP)" from the CPF or from the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

e) If entering into a LWOP status to enter the **military** service, including ART employees, obtains the handout "Information for Employees Entering Military Active Duty" from the CPF or the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

f) Reads Portability Notice statement on the Clearance Sheet.

(1) Indicates on Clearance Sheet if planning to port Option B coverage.

(2) Contacts BEST prior to separation to obtain Portability Notice.

g) Completes Portability Notice within 60 days of terminating event and forwards to arrive at BEST not later than the 65th day after the terminating event (79th day if employee lives overseas). Also mails a copy to MetLife at the address on the notice.

2) CPF Action:

a) Adds the following statement to the local clearance sheet: “Are you considering converting your life insurance to a private company? If yes, you should contact the BEST at 1-800-997-2378 (or commercial 527-2378 if calling within the San Antonio area), and request SF 2821, Agency Certification of Insurance Status, before your separation date. After separation, you may contact BEST at 1-800-540-4047 (or commercial 527-2399 if calling within the San Antonio area).”

b) Provides a completed SF 2819, Notice of Conversion Privilege, to separating employees who are enrolled in FEGLI. Obtains data for completing SF 2819 from the Civilian Servicing Unit (CSU) application. Faxes OPF copy to AFPC/DPCMB at DSN 665-2936 or commercial (210) 565-2936 for profiling into PARIS.

c) Adds the following statement to the local clearance sheet: “Are you considering porting (continuing) Option B coverage after separation? If yes, you should contact BEST at 1-800-997-2378 (or commercial 527-2378 if calling within the San Antonio area) and request the “Portability Notice” before your separation date. After separation, you may contact BEST at 1-800-540-4047 (or commercial 527-2399 if calling within the San Antonio area).”

d) Refers employees to AFPC/DPCMB with questions.

e) If employee wants to convert his or her FEGLI to a private policy, encourages employee to contact the BEST automated phone system prior to separation.

f) Provides employees entering a LWOP status the LWOP benefits summaries referenced in 1d and 1e above, as applicable.

g) Refers employees to AFPC/DPCMB with all other FEGLI separation questions.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Prepares and mails completed SF 2821, Agency Certification of Insurance Status, to employee, if requested.

c) Scans SF 2819, Notice of Conversion Privilege, into PARIS upon receipt.

d) Provides employee with Option B Portability Notice upon request, if eligible to port.

e) Upon receipt of completed Portability Notice, date stamps, and verifies timely completion and receipt. If meets both requirements, prepares SF 2821. Forwards SF 2821, the

Notice, and any designations, assignments and/or court orders to MetLife within 60 days of receipt of the Notice. Scans all documents into PARIS.

j. Modern DCPDS Reports (formerly Report on Individual Persons (RIPs))

1) Benefits-related reports have not been updated to reflect regionalized servicing. AFPC/DPCMB attempted to change the wording but has been unsuccessful due to a moratorium on changes.

2) **CPF Action:** Refer to following guidance for Modern DCPDS reports until further notice:

- FEGL2 - FEGLI (Life Insurance) Follow-Up Notice. Destroy. OPM no longer requires documentation that new employee failed to elect optional FEGLI.
- FEGLI - FEGLI Eligibility Expiration. Destroy. Provide the handout “Benefits Summary for New Civilian Employees” to new employees or employees converting from a temporary to a permanent appointment.

3) **AFPC/DPCMB Action:** Provides advisory service to employees.

k. Return to Duty (RTD) from Leave Without Pay (LWOP)

1) **Employee Action:**

(a) Contacts BEST with questions.

(b) Reviews LES to ensure FEGLI deductions resumed after returning to duty. This applies to employees whose coverage was terminated due to 12 months in a non-pay status. Employees who used the BEST automated phone system or EBIS to waive their FEGLI coverage are not eligible to have their coverage resume upon returning to duty, including employees who entered LWOP for active military duty.

2) **CPF Action:** Refers employees with questions to AFPC/DPCMB.

3) **AFPC Staffing Team Action:** Codes and inputs RTD RPA, ensuring FEGLI coverage resumes for employees whose coverage terminated after 12 months in a non-pay status. Employees who waived their coverage are not eligible to have their FEGLI coverage resume upon return to duty.

4) **AFPC/DPCMB Action:** Provides advisory service.

l. Living Benefits

1) **Employee Action:**

a) Employees who are terminally ill with a life expectancy of nine months or less are eligible to apply for a living benefit if they have not already assigned their life insurance. Only

Basic insurance is available for payment. Employees may contact BEST with questions regarding living benefits.

b) Obtains the application form “Claim for Living Benefits” (Form FE-8) by calling the Office of Federal Employees’ Group Life Insurance (OFEGLI) at 1-800-633-4542.

c) Upon receipt of Form FE-8, completes Part A, and takes to physician for completion of Part B. Returns the completed form to OFEGLI.

d) If OFEGLI approves the application for a living benefit, the employee will receive a check and an Explanation of Benefits (EOB) (Form FE-8C). Employees may change their minds about electing a living benefit up until they cash or deposit the check. The effective date of the living benefit election is the date the check is cashed or deposited.

e) OFEGLI will notify the employee if the living benefit is not approved. There are no appeal rights; however, the employee may provide additional medical evidence to support the claim or reapply if future circumstances warrant.

2) CPF Action:

a) Refers employees with questions to AFPC/DPCMB.

b) Faxes Form FE-8 to AFPC/DPCMB (DSN 665-2936 or 210-565-2936) if OFEGLI erroneously sends to the CPF for completion of agency portion.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Refers employees to OFEGLI at 1-800-633-4542 to obtain Form FE-8.

c) Completes and faxes FE-8 to OFEGLI. Mails original to OFEGLI.

d) Faxes certified copy of FE-8 to DFAS for payroll office certification.

e) Scans completed FE-8 into PARIS.

f) Processes and authenticates SF 50 upon receipt of Explanation of Benefits (EOB) (Form FE-8C) from OFEGLI, from OFEGLI. Scans EOB into PARIS.

3) DFAS Action: Upon receipt of Form FE-8, completes the payroll office certification. Faxes copy and mails original to OFEGLI.

m. Assignment of Insurance

1) Employee Action:

a) Contacts BEST for advisory service.

b) Obtains Form RI 76-10 (Assignment of Federal Employees' Group Life Insurance) from the unit Organizational Representative or from the OPM web site at http://www.opm.gov/forms/pdf_fill/ri76-10.pdf.

c) Completes Form RI 76-10 and obtains the signatures of two witnesses. The person to whom the insurance is assigned may not be a witness.

d) Forwards the completed RI 76-10 to AFPC/DPCMB, 550 C Street West Ste 57, Randolph AFB TX 78150-4759.

e) Provides AFPC/DPCMB address to the viatical settlement company if applying for a cash payment.

2) CPF Action:

a) Refers employees with questions to AFPC/DPCMB.

b) Advises employees to forward completed RI 76-10 to APFC/DPCMB.

c) Forwards paperwork received from viatical settlement companies to AFPC/DPCMB for completion.

3) AFPC/DPCMB Action:

a) Provides advisory service to employees.

b) Advises employees they may obtain RI 76-10 from the OPM web site or their unit Organizational Representative.

c) Processes RI 76-10 and certifies receipt. Returns copy 2 to employee.

d) Provides each assignee a copy of Copy 3 of assignment form, a blank SF 2823, and FEGLI Booklet (RI 76-21).

e) Scans completed RI 76-10 into PARIS. Sends original form to AFPC/DPCMB for filing in OPF.

4) AFPC/DPCMB (OPF Mgmt) Action: Files original RI 76-10 into hardcopy OPF.

n. Foster Children

1) Employee Action:

a) Contacts BEST for assistance.

b) Makes election through the BEST automated phone or EBIS web systems.

c) Employees increasing Option C due to acquisition of a foster child must provide a “Statement of Foster Child Status” to BEST via fax (DSN 665-2936 or (210) 565-2936). The statement may be obtained from the AFPC DPC web site (http://www.afpc.randolph.af.mil/dpc/BEST/foster_status.htm) or by calling the BEST automated phone system and requesting fax-back document #1004.

d) Employees are responsible for the validity of FEGLI changes. Disciplinary action may be taken upon discovery of a fraudulent change.

e) Upon request, provides BEST with proper documentation of family relationship, including regular/substantial support. Failure to provide requested documentation may result in the FEGLI change being cancelled.

f) Reviews LES to ensure election is correct. LES serves as official notification of FEGLI election. BEST does not provide employees with copy of SF 2817.

2) **CPF Action:**

a) Refers employees with questions to BEST.

b) Refers employees to the BEST automated phone system or EBIS to make elections.

c) Investigates any fraudulent change/election referred by AFPC/DPCMB and determines if disciplinary action is warranted for falsification of a personnel document.

3) **AFPC/DPCMB Action:**

a) Counsels employees regarding requirements for increasing coverage under Option C due to the addition of a foster child.

b) Advises employees they may obtain the “Statement of Foster Child Status” from the AFPC DPC web site (http://www.afpc.randolph.af.mil/dpc/BEST/foster_status.htm) or by calling the BEST automated phone system and requesting fax-back document #1004.

c) Assists employees with the enrollment, preparing a counselor-assisted on-line transaction. Relies on IVRS/EBIS/Modern DCPDS interface to update DCPS. Provides PARIS an electronic data stream to populate SF 2817.

d) Refers fraudulent elections to the servicing CPF for investigation and determination if disciplinary action is warranted for falsification of a personnel document. Provides documentation and/or testimony as required.

7. **Voluntary Contributions/Deposits, Redeposits/Refunds to Retirement Fund**

a. **Voluntary Contributions:**

1) **Employee Action:**

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Obtains SF 2804, Application to Make Voluntary Contributions, from the unit Organizational Representative or OPM web at <http://www.opm.gov/forms/pdfimage/sf2804.pdf>.

c) Completes SF 2804 and mails to BEST.

2) **CPF Action:** Refers employees to AFPC/DPCMB with questions.

3) **AFPC/DPCMB Action:**

a) Provides advisory service.

b) Upon receipt of SF 2804, Application to Make Voluntary Contributions, completes the verification of service and certifies.

c) Forwards completed SF 2804 to the Office of Personnel Management (OPM).

b. Deposit/Redeposit Procedures:

1) **Employee Action:**

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Contacts BEST for SF 2803, Application to Make Deposit or Redeposit (CSRS), or SF 3108, Application to Make Service Credit Payment for Civilian Service (FERS).

c) Receives SF 2803 or SF 3108 from BEST with agency portion completed. Completes applicant's portion of SF 2803 or SF 3108 and forwards to the Office of Personnel Management (OPM).

d) Reviews OPM acknowledgment letter and makes appropriate payments directly to OPM.

e) Retains copy of OPM receipt showing full or partial payment. Provides copy of OPM receipt reflecting payment in full to BEST.

2) **CPF Action:** Refers employees to AFPC/DPCMB with questions.

3) **AFPC/DPCMB Action:**

a) Provides advisory service.

b) Completes verification of service and certifies SF 2803, Application to Make Deposit or Redeposit (CSRS), or SF 3108, Application to Make Service Credit Payment for Civilian Service (FERS).

c) Mails/faxes forms to employees.

d) Scans copy of Office of Personnel Management (OPM) receipt reflecting payment in full in the automated OPF.

c. Refund of Retirement Contributions:

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378, if calling within the San Antonio area, with questions.

b) Obtains SF 2802, Application for Refund of Retirement Deductions (CSRS), or SF 3106, Application for Refund of Retirement Deductions (FERS), from CPF or unit Organizational Representative. Completes and mails to BEST within 30 days of separation. If separated more than 30 days, mails directly to the Office of Personnel Management (OPM) at the address on the form.

2) CPF Action:

a) Refers employees to AFPC/DPCMB with questions.

b) Provides employees separating from federal service with applicable material specified in the out-processing section, including the SF 2802 or SF 3106, as applicable.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Completes agency portion of SF 2802 or SF 3106 for a separated employee who initiates application for refund of retirement contributions within 30 days of separation.

c) Forwards SF 2802 or SF 3106 to servicing DFAS Office for forwarding to OPM.

d. Post-56 Military Deposit:

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Reviews accession package information provided by the CPF and follows instructions, if a new hire.

c) Upon receipt of application forms from BEST, employee follows the instructions on the cover sheet:

(1) If employee does not have his or her estimated military earnings:

(a) Completes the personal information on Form RI 20-97, Estimated Earnings During Military Service, attaches all DD Forms 214, Certificate of Release or Discharge from Active Duty, and forwards the RI 20-97 to the appropriate military finance office for verification of military earnings.

(b) Upon receipt of estimated military earnings, completes personal information on SF 2803, Application to Make Deposit or Redeposit (CSRS), or SF 3108, Application to Make Service Credit Payment (FERS), as applicable, and forwards it with the Estimated Earnings, Military Deposit Worksheet, and all DD Forms 214 to the local or regional DFAS office in accordance with local procedures for paying military deposits.

(2) If employee already has his or her estimated military earnings, completes the personal information on SF 2803/SF 3108, as applicable, attaches the Estimated Earnings Sheet, Military Deposit Worksheet, and all DD Forms 214, and forwards to the local or regional DFAS office IAW local procedures for paying military deposits.

d) Makes arrangements with DFAS to pay the required deposit.

e) When deposit is paid in full, forwards a copy of OPM Form 1514, Military Deposit Worksheet, and RI 20-97 to BEST at fax DSN 665-2936, or commercial (210) 565-2936.

f) If employee has active Reserve or National Guard duty, contacts BEST for information on how to obtain AF Form 1613, Statement of Service.

2) **CPF Action:** Refers employees to AFPC/DPCMB with questions.

3) **AFPC/DPCMB Action:**

a) Provides advisory service.

b) Upon request from employee, sends required documents by fax or mail. The package will include an instruction sheet and the following forms: SF 2803, Application to Make Deposit or Redeposit (CSRS) or SF 3108, Application to Make Service Credit Payment (FERS); RI 20-97, Estimated Earnings During Military Service (with military finance office addresses); and OPM Form 1514, Military Deposit Worksheet.

c) Counsels and advises employee to send the request to the appropriate military finance office to verify estimated military earnings, if not already obtained.

d) Upon receipt of earnings, advises employee to hand-carry or mail all documents to the local civilian payroll office or regional DFAS office, in accordance with local procedures.

e) If USERRA, computes two deposits: one based on civilian service and one based on military service. Provides to the employee with instructions to attach the lesser deposit computation to the military deposit application and provide to DFAS.

f) Scans OPM Form 1514 and RI 20-97 (or equivalent substitutes) into the OPF area of PARIS upon receipt from employee.

8. Retirements

NOTE: Do not use the Civilian Servicing Unit (CSU) application retirement data elements (Vol Ret Est and Early Ret Est) to determine when employee is eligible to retire under optional, early, or discontinued service retirement. If employee is retired military, use a combination of date of birth and SCD-CIV. Otherwise, use a combination of date of birth and SCD-Leave.

a. Voluntary Retirement:

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, for retirement counseling.

b) Obtains general retirement information via the BEST automated phone system, EBIS web system, or the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/retirements.htm>.

c) Reviews the following retirement documents located on the BEST web site at <http://www.afpc.randolph.af.mil/dpc/BEST/retirements.htm>. Once there, click on the appropriate retirement system, CSRS or FERS. The second document is also available as a fax document from the BEST phone system. The fax-back document number is placed in parentheses after that document.

(1) Eligibility for Retirement

(2) Preparing for Retirement (fax-back document #2002)

d) Obtains retirement estimates from either the BEST automated phone system or web automated system (EBIS). Employees who are firefighters, air traffic controllers, law enforcement officers, or retired military who are combining military and civilian service, should use the EBIS web system. Employees with non-appropriated fund (NAF) service, part-time service, civilian temporary service, civilian service for which a refund of retirement contributions was received, post-56 military service for which a deposit has not been made, or who elected to be covered under the FERS retirement system, should use the BEST automated phone system and speak with a benefits counselor. Employees within one year of retirement are highly encouraged to contact BEST and speak with a benefits counselor regarding the results of any estimate received from the automated systems.

e) Obtains list of required retirement forms from the BEST automated phone system (fax-back document #2010), or from the AFPC DPC web site at http://www.afpc.randolph.af.mil/dpc/BEST/retirement_forms.htm.

f) Obtains retirement forms from the BEST homepage (link above), the unit Organizational Representative, or the OPM web site at http://www.opm.gov/forms/html/ff_sf.htm. Form W4-P is available at <http://www.irs.gov>.

(1) Completes all forms to include a hard copy of SF-52/RPA, Request for Personnel Action, documenting the request to retire. The SF 52/RPA must be signed on page 2.

(2) Forwards all completed retirement forms, including the hard copy SF 52/RPA, to arrive at BEST 90 to 120 days in advance of the retirement date. EXCEPTION: ART employees reaching High Year Tenure (HYT) or Mandatory Separation Date (MSD) should not submit their retirement applications until after receipt of the notice of proposed separation and decision to separate letters, if the employee wishes to retire under Discontinued Service Retirement (DSR) provisions.

(3) If being offered a Voluntary Separation Incentive Payment (VSIP), submits VSIP application to the CPF for approval. Includes a copy of the CPF approval letter with the retirement package.

(4) Retains a copy of all paperwork submitted to BEST.

g) Advises management of retirement decision so the electronic Request for Personnel Action (RPA) may be initiated.

2) **Supervisor Action:**

a) Assists employee in submitting electronic Request for Personnel Action (RPA) 90 days in advance of effective date. (Provides a hard copy of SF 52/RPA for employee to sign and forward with retirement application.) Forwards electronic RPA to the CPF (include effective date of retirement on RPA).

b) Completes Retirement Certificate and initiates award action, if appropriate. Checks the Civilian Servicing Unit (CSU) application for length of service information for retirement certificate. Management is responsible for Presidential Letters, honorary awards, etc.

3) **CPF Action:**

a) Directs employees to AFPC/DPCMB for retirement advisory and processing services.

b) Coordinates on RPA and forwards to DPCMB-ABE (AFPC, Benefits and Entitlements). If receiving VSIP, codes information on RPA or puts in Remarks area.

c) Advises management officials of the appropriate recognition. Advises management to check the Civilian Servicing Unit (CSU) application for length of service for retirement certificate. Management is responsible for Presidential Letters, honorary awards, etc.

d) Processes awards package, if applicable.

e) Where VSIP has been authorized, provides AFPC/DPCMB with copy of the authority approval letter and a list of employees approved for each.

4) AFPC/DPCMB Action:

a) Provides advisory services.

b) Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate.

c) Processes retirement application and SF 52/RPA. Forwards Acknowledgement Card to employee upon receipt of retirement package.

(1) Completes Certified Summary of Federal Service, SF 2801-1 (CSRS), or SF 3107-1 (FERS).

(2) Completes RPA and inputs.

(3) Files signed copy of SF 52/RPA on the right side of OPF.

(4) Mails final retirement estimate to employee.

(5) Prepares SF 2810 to terminate FEHB if employee appears to be ineligible to carry into retirement. Forwards all FEHB documents with retirement package. OPM will make final decision.

d) Processes retirement application through DFAS to the Office of Personnel Management (OPM).

e) Provides OPM telephone numbers to retirees.

f) Provides assistance to retired employees who are waiting to be placed in an interim pay status with OPM. Once OPM places retiree in interim pay status, retiree deals directly with OPM via their automated phone system (1-888-767-6738).

g) Returns OPF to AFPC/DPCMP for forwarding to the National Personnel Records Center (NPRC).

h) Scans retirement case file to administrative area of PARIS.

b. Disability Retirement:

1) Supervisor Action:

a) Directs employees to AFPC/DPCMB for retirement advisory and processing services when the employee advises he or she is filing for disability retirement.

b) Completes SF 3112B, Supervisor's Statement, and attaches at a minimum, the employee's Position Description, Performance Standards, and most recent Performance Appraisal. Attaches other documentation as the situation requires.

c) Approves requests for leave or leave without pay when employee has a pending disability application.

d) Assists employee in submitting an electronic Request for Personnel Action (RPA) when initial disability paperwork is submitted. (Provides a copy of RPA for employee to sign and forward with initial disability retirement application.) Forwards RPA to the CPF *without* an effective date of retirement.

e) Completes retirement certificate and initiates award action, if and when appropriate. Checks the Civilian Servicing Unit (CSU) application for length of service information for retirement certificate. Management is responsible for Presidential Letters, honorary awards, etc.

2) **Employee Action:**

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, for counseling and an annuity estimate.

b) Obtains list of required retirement forms from the BEST home page at http://www.afpc.randolph.af.mil/dpc/BEST/disability_retirement_forms.htm, or via the BEST automated phone system, fax-back document #2011.

c) Obtains required retirement forms from unit Organizational Representative or from the OPM web site at http://www.opm.gov/forms/html/ff_sf.htm. Form W-4P is available at <http://www.irs.gov>.

(1) Completes all the forms to include a signed SF 52, Request for Personnel Action, or signed RPA, documenting the employee's desire to retire.

(2) Forwards the complete package to the CPF, including the signed hard copy of SF 52.

(3) Retains a copy of all paperwork submitted to the CPF.

3) **CPF Action:**

a) Directs employees to AFPC/DPCMB for disability retirement advisory and processing services upon advisement by the employee that he or she is or may be filing for disability retirement.

b) Assists when on-site counseling is necessary (example: employee is in the hospital).

(1) Coordinates closely with AFPC/DPCMB.

(2) Delivers required forms and provides information from AFPC/DPCMB when requested due to circumstances.

c) Determines if reasonable accommodation is possible and completes the Agency Certification of Reassignment and Accommodation Efforts, SF 3112D.

(1) Reviews applicant, supervisor, and physician statements, and other pertinent documentation.

(2) Accomplishes in conjunction with People with Disabilities Program Manager and the servicing Staffing Team.

d) Accepts disability retirement application from employee and forwards complete package to AFPC/DPCMB. Determines if employee meets minimum qualifications for disability retirement.

(1) Reviews the Civilian Servicing Unit (CSU) application.

(2) For CSRS: 5 years civilian service.

(3) For FERS: 18 months civilian service.

e) Provides AFPC/DPCMB the last day of pay (LDOP) when requested.

f) Coordinates on RPA and forwards through Modern DCPDS to DPCMB-ABE (AFPC, Benefits and Entitlements).

g) Advises management to check the Civilian Servicing Unit (CSU) application for length of service for retirement certificates, using SCD-CIV if retired military, and SCD-Leave for all other employees. In addition, Presidential Letters, honorary awards, etc., are a management responsibility.

4) AFPC/DPCMB Action:

a) Provides advisory services.

b) Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate.

c) Provides disability retirement annuity estimates.

d) Processes retirement application through DFAS to the Office of Personnel Management (OPM).

e) Sets a suspense to follow-up on the application pending approval by OPM.

f) Upon receipt of the OPM decision letter, notifies the employee and the CPF of approval or disapproval.

(1) If application is disapproved, maintains copy for 45 days pending employee's request for reconsideration. If employee does not file for reconsideration, scans the application and disapproval letter into the administrative area of PARIS.

(2) If the application is approved completes remainder of retirement processing in accordance with the OPM approval letter.

(3) Processes approved disability application paperwork through DFAS to OPM.

g) Completes RPA.

h) Provides assistance to retired employees who are waiting to be placed in an interim pay status with OPM. Once OPM places retiree in interim pay status, retiree deals directly with OPM via their automated phone system (1-888-767-6738).

i) Files hard copy SF 52 on right side of OPF.

j) Returns OPF to DPCMP for forwarding to the National Personnel Records Center (NPRC).

k) Scans retirement case file to administrative area of PARIS.

c. Discontinued Service Retirement (DSR) (Involuntary Separations: Reduction-In-Force, Non-Disciplinary Actions)

1) Supervisor Action:

a) Initiates proposed action.

b) Issues decision letter. If employee chooses retirement, letter should so indicate.

(1) Voluntary optional retirement example: "You have chosen to voluntarily retire effective ____ (date). Should you withdraw your retirement, you will be separated effective ____ (date)."

(2) DSR example: "You have chosen to resign effective ____ (date) in lieu of involuntary action. Therefore, you may be eligible for a discontinued service retirement. Please be advised that only the Office of Personnel Management (OPM) has the authority to make this determination. Should you withdraw your resignation, you will be separated effective ____ (date)."

c) Assists employee in submitting electronic Request for Personnel Action (RPA) to the CPF. Provides the employee with a hard copy of the RPA (SF 52) to sign and place with the retirement package.

d) Initiates award action, if appropriate.

e) Completes retirement certificate. Checks the Civilian Servicing Unit (CSU) application for length of service information for retirement certificate.

2) Employee Action:

a) Contacts BEST for retirement counseling.

b) Obtains annuity estimate from the BEST automated phone system or from the EBIS web site at http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm. Employees who are firefighters, air traffic controllers, law enforcement officers, or retired military who are combining military and civilian service, should use the EBIS web system. Employees with non-appropriated fund (NAF) service, part-time service, civilian temporary service, civilian service for which a refund of retirement contributions was received, post-56 military service for which a deposit has not been made, or who elected to be covered under the FERS retirement system, should use the BEST automated phone system and speak with a benefits counselor. Employees are highly encouraged to contact BEST and speak with a benefits counselor regarding the results of any estimate received from the automated system.

c) Obtains list of required retirement forms from the BEST web site at http://www.afpc.randolph.af.mil/dpc/BEST/retirement_forms.htm. This list of retirement forms is also available from the BEST phone system by requesting fax document #2010. Reviews the document "Preparing for Retirement," which can be obtained by calling the BEST phone system and requesting fax document #2002, or by visiting the BEST web site at <http://www.afpc.randolph.af.mil/dpc/BEST/retiring.htm>.

d) Obtains required retirement forms from the BEST web page (link above), the unit Organizational Representative, or from the OPM web site at http://www.opm.gov/forms/html/ff_sf.htm. Form W-4P is available at <http://www.irs.gov>.

(1) Completes all forms, to include a signed SF 52, Request for Personnel Action (RPA), documenting the employee's desire to retire.

(2) Forwards complete retirement package to include the notice of proposed removal, decision to remove, and the hard copy SF 52 with signature to BEST for processing.

(3) Retains a copy of all paperwork submitted to BEST.

3) CPF Action:

a) Uses the Civilian Servicing Unit (CSU) application to determine if an employee "may" be eligible for retirement. (See NOTE at beginning of Retirements chapter.) Once the list of affected employees is narrowed down, provides to AFPC/DPCMB for determination of actual eligibility.

(1) Voluntary Optional Retirement:

- 55 with 30 years of service (FERS: MRA with 30 years of service).
- 60 with 20 years of service.
- 62 with 5 years of service.
- FERS: MRA with 10 years of service.

(2) Discontinued Service Retirement (especially important under pre-RIF planning): Age 50 with 20 years of service or any age with 25 years of service.

(3) Disability Retirement (see information under Disability Retirement Section).

b) Notice Letter: Includes statement on notice letter (if appropriate) that employee may be eligible to retire. Example: “According to personnel records, you may be eligible for (voluntary/discontinued service retirement). If you need a retirement estimate, or to speak to a benefits counselor for retirement advice, please contact AFPC/DPCMB at 1-800-997-2378, or commercial 527-2378 if within the San Antonio area.”

(1) Instructs employee to contact AFPC/DPCMB for retirement counseling.

(2) Ensures supervisor includes retirement statement on decision letter.

c) Coordinates on RPA and forwards via Modern DCPDS to DPCMB-ABE (AFPC, Benefits and Entitlements).

d) Prepares OPM Form 1510, Certification of Agency Offer of Position and Required Documentation, in all cases where an employee is being involuntarily separated. Promptly provides OPM Form 1510 at the request of AFPC/DPCMB in those cases where the employee resigns/retires prior to involuntary separation. OPM will make the final decision as to whether the employee is eligible for Discontinued Service Retirement.

4) **AFPC/DPCMB Action:**

a) Provides advisory services.

b) Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate.

c) Processes retirement application and SF 52. Forwards Acknowledgement Receipt Card to employee upon receipt of retirement package.

(1) Completes Certified Summary of Service (SF 2801-1 if CSRS, or SF 3107-1 if FERS).

(2) Files hard copy SF 52 on right side of OPF.

(3) Mails final retirement estimate to employee.

d) Processes retirement application through DFAS to the Office of Personnel Management (OPM).

e) Provides OPM telephone numbers to retirees.

f) Provides assistance to retired employees who are waiting to be placed in an interim pay status with OPM. Once OPM places retiree in interim pay status, retiree deals directly with OPM via their automated phone system (1-888-767-6738).

g) Returns OPF to AFPC/DPCMP for forwarding to the National Personnel Records Center (NPRC).

h) Scans retirement case file to administrative area of PARIS.

d. Voluntary Early Retirement (VERA) and Voluntary Separation Incentive Payment (VSIP):

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, for retirement counseling.

b) Obtains annuity estimate from the BEST automated phone system or the EBIS web system (http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm). Employees who are firefighters, law enforcement officers, air traffic controllers, or retired military who are combining military and civilian service, should use the EBIS web system. Employees with non-appropriated fund (NAF) service, part-time service, civilian temporary service, civilian service for which a refund of retirement contributions was received, post-56 military service for which a deposit has not been made, or who elected to be covered under the FERS retirement system, should use the BEST automated phone system and speak with a benefits counselor. Employees are highly encouraged to contact BEST and speak with a benefits counselor regarding the results of any estimate received from the automated systems.

c) Submits Voluntary Separation Incentive Payment (VSIP) application to CPF. CPF must approve.

d) Advises management of retirement decision and initiates an electronic SF 52 (RPA) through Modern DCPDS to DPCMB-ABE (AFPC, Benefits and Entitlements) once VERA and, if applicable, VSIP is approved.

e) Obtains list of required retirement forms from the BEST automated phone system (fax-back document #2010), or from the BEST web site at http://www.afpc.randolph.af.mil/dpc/BEST/retirement_forms.htm. Reviews the document "Preparing for Retirement" which may be obtained from the BEST web site at <http://www.afpc.randolph.af.mil/dpc/BEST/retiring.htm>, or by calling the BEST phone system and requesting fax document #2002.

f) Obtains required retirement forms from the BEST web page (link above), the unit Organizational Representative, or the OPM web site at http://www.opm.gov/forms/html/ff_sf.htm. Form W-4P is available at <http://www.irs.gov>.

g) Completes all forms to include a SF 52/RPA, Request for Personnel Action, documenting the employee's request to retire. This form must be signed on page 2.

h) Forwards all completed forms to BEST for processing, including a copy of the CPF letter approving the VERA and/or VSIP. Retains a copy of all paperwork submitted to BEST.

3) **Supervisor Action:**

a) Directs employee to CPF regarding Voluntary Separation Incentive Payment (VSIP) issues.

b) Assists employee in submitting an electronic Request for Personnel Action (RPA) to the CPF, including the effective date on RPA. Provides hard copy of RPA (SF 52) to employee for signature and forwarding with retirement package.

c) Completes Retirement Certificate and initiates award action, if appropriate. Checks the Civilian Servicing Unit (CSU) application for length of service information for retirement certificate. Management is responsible for Presidential Letters, honorary awards, etc.

4) **CPF Action:**

a) Forwards copy of MAJCOM VERA approval letters to AFPC/DPCMB for advance planning purposes.

b) Follows current DoD and AF procedures for processing requests for Voluntary Early Retirement Authority (VERA) and Voluntary Separation Incentive Payment (VSIP). Issues VERA/VSIP letter to affected employees. Determines who will be approved.

c) Ensures the VERA and/or VSIP acceptance letters include the statement that the employee understands he or she will not be eligible for severance pay, unemployment insurance, etc., by accepting the incentive.

d) Determines if employee meets minimum service qualifications for early retirement. Age 50 with 20 years of service or any age and 25 years of service for CSRS and FERS.

e) Directs employees to AFPC/DPCMB for retirement advisory services.

f) Coordinates on RPA and forwards through Modern DCPDS to DPCMB-ABE (AFPC, Benefits and Entitlements).

(1) If employee is retiring under VERA, annotates the remarks area of the RPA with VERA authority number and date.

(2) If employee is receiving a VSIP, annotates the remarks area of the RPA with VSIP approved for \$ amount.

g) Advises management officials of appropriate recognition. Advises management to check the Civilian Servicing Unit (CSU) application for length of service for retirement certificate. Management is responsible for Presidential Letters, honorary awards, etc.

h) Processes awards package, if applicable.

5) AFPC/DPCMB Action:

a) Provides advisory services.

b) Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate.

c) Verifies Voluntary Separation Incentive Payment (VSIP) amount.

d) Processes retirement application and RPA. Forwards Acknowledgement Card to employee upon receipt of retirement package.

(1) Completes Certified Summary of Service (SF 2801-1 if CSRS, SF 3107-1 if FERS).

(2) Files hard copy SF 52 on right side of OPF.

(3) Mails final retirement estimate to employee.

e) Processes retirement application through DFAS to the Office of Personnel Management (OPM).

f) Provides OPM telephone numbers to retirees.

g) Provides assistance to retired employees who are waiting to be placed in an interim pay status with OPM. Once OPM places retiree in interim pay status, retiree deals directly with OPM via their automated phone system (1-888-767-6738).

h) Returns OPF to AFPC/DPCMP for forwarding to the National Personnel Records Center (NPRC).

i) Scans the retirement file to administrative area of PARIS.

e. Mandatory Retirement:

1) Employee Action:

a) Receives mandatory retirement date notification from supervisor or CPF as per local policy.

b) Contacts BEST for counseling.

c) Obtains a list of required retirement forms from the BEST web site at http://www.afpc.randolph.af.mil/dpc/BEST/retirement_forms.htm, or by calling the BEST phone system and requesting fax document #2010. Reviews document "Preparing for Retirement" on the web at <http://www.afpc.randolph.af.mil/dpc/BEST/retiring.htm>, or requests by calling the BEST phone system and requesting fax document #2002.

d) Obtains required retirement forms from the BEST web page (link above), the unit Organizational Representative, or the OPM web site at http://www.opm.gov/forms/html/ff_sf.htm. Form W-4P is available at <http://www.irs.gov>.

e) Completes all forms to include hard copy RPA/SF52, Request for Personnel Action, to document the intention to retire. This form must be signed on page 2.

f) Forwards all completed forms to BEST for processing, including the signed hard copy of the SF 52. Retains a copy of all paperwork submitted to BEST.

g) Advises management of retirement decision and initiates electronic RPA (SF 52).

2) **Supervisor Action:**

a) Initiates appropriate removal notice.

b) Directs employee to AFPC/DPCMB for retirement advisory and processing services.

c) Assists employee in submitting the electronic RPA to the CPF, to include the effective date of retirement.

d) Completes the Retirement Certificate and initiates award action, if appropriate. Checks the Civilian Servicing Unit (CSU) application for length of service information for retirement certificate. Management is responsible for Presidential Letters, honorary awards, etc.

3) **CPF Action:**

a) Receives and sends RETLT - Mandatory Retirement Date Report to management. Coordinates appropriate removal notice with management.

b) Notifies AFPC/DPCMB when extensions of mandatory removal date have been requested and/or approved.

c) Coordinates on RPA and forwards via Modern DCPDS to DPCMB-ABE (AFPC, Benefits and Entitlements).

d) Advises management officials of the appropriate recognition. Advises management to check the Civilian Servicing Unit (CSU) application for length of service for retirement certificate. Management is responsible for Presidential letters, honorary awards, etc.

e) Process awards package, if applicable.

4) **AFPC/DPCMB Action:**

a) Provides advisory services.

b) Confirms CPF is aware of the mandatory retirement date.

c) Refers CPF/Management to the Civilian Servicing Unit (CSU) application for length of service for retirement certificate.

d) Processes retirement application and electronic SF 52.

(1) Completes Certified Summary of Service (SF 2801-1 if CSRS, or SF 3107-1 if FERS).

(2) Files hard copy SF 52 on right side of OPF.

(3) Mails final retirement estimate to employee.

e) Processes retirement application through DFAS to OPM.

f) Provides OPM telephone numbers to retirees.

g) Provides assistance to retired employees who are waiting to be placed in an interim pay status with OPM. Once OPM places retiree in interim pay status, retiree deals directly with OPM via their automated phone system (1-888-767-6738).

h) Forwards OPF to DPCMP for forwarding to NPRC.

i) Scans retirement file into administrative area of PARIS.

f. Modern DCPDS Reports (formerly Report on Individual Persons (RIPs))

1) Benefits-related reports have not been updated to reflect regionalized servicing. AFPC/DPCMB attempted to change the wording but has been unsuccessful due to a moratorium on changes.

2) **CPF Action:** Refer to the following guidance for Modern DCPDS reports until further notice:

- FERS2 - FERS Transfer Decision Period. Destroy. Provide SF 3109 and FERS Transfer Handbook to rehired CSRS, CSRS-Offset, or FICA employees eligible to elect FERS coverage during the first 6 months after rehire.
- FERSS - Expiration of FERS Transfer Decision Period. Destroy. Provide the handout “Benefits Summary for New Civilian Employees” to rehired CSRS, CSRS-Offset, or FICA employees eligible to elect coverage. It advises that employees have 6 months from date of hire to elect FERS.
- RP751 - Projected Retirement-Advance Employee Notice. Destroy. No longer needed.
- RET03 - Civil Service Retirement Annuity Computation. Destroy. AFPC/DPCMB automated systems provide annuity computations.
- FER01 - FERS Transfer Handbook. Destroy.
- LWPEX - LWP Pending Disability Retirement. Destroy. OPM regulations changed and this is no longer required.
- RETEX - Mandatory Retirement Date Expired. Issue until further notice.
- RETLT - Mandatory Retirement Date Letter. Issue until further notice.
- RP752 – Advance Notice to Complete Action-Retirement Processing. Destroy.

3) **AFPC/DPCMB Action:** Provides advisory service to employees.

9. BENEFICIARY FORMS: SF 2808/SF 2823/SF 1152/SF 3102/TSP-3:

a. Processing Procedures

1) Employee Action:

a) Contacts BEST at 1-800-997-2378, or commercial 527-2378 if calling within the San Antonio area, with questions.

b) Obtains the following beneficiary forms from the unit Organizational Representative or the OPM web site at <http://www.opm.gov/insure/designations/index.htm>:

- SF 2823, Designation of Beneficiary Under OFEGLI
- SF 1152, Designation of Beneficiary Unpaid Compensation of Deceased Civilian Employee
- SF 3102, FERS Designation of Beneficiary
- SF 2808, CSRS Designation of Beneficiary
- TSP 3, Designation of Beneficiary

c) Completes beneficiary forms.

d) Submits SF 1152, SF 2823, & SF 3102 to CPF.

(1) Mails SF 2808 to OPM at address on reverse of form.

(2) Mails TSP 3 to the TSP Service Office at address on reverse of form.

e) Retains employee copies after certification by CPF.

2) CPF Action:

a) Refers all designation of beneficiary questions to AFPC/DPCMB.

b) Refers employee to the unit Organizational Representative or appropriate web site for beneficiary forms.

c) Certifies designation of beneficiary forms in accordance with the chart below.

d) Gives employee copies to employee after certification. (NOTE: AFPC/DPCMB will not mail employee copies.

e) Faxes SF 1152 to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936, and destroys the original.

f) Mails original SF 2823 and SF 3102 to AFPC/DPCMB.

3) AFPC Action:

a) AFPC/DPCMB reviews forms to ensure they are fully and correctly completed. If a form is incomplete or contains an error rendering it invalid, returns to employee to either fully complete, or to prepare a new form.

b) AFPC/DPCMB scans image into PARIS.

c) AFPC/DPCMP files originals in OPF.

b. Court Orders:

1) Employee Action:

a) Submits via mail to BEST a certified copy a of court order where the court directed the employee to name a specific person or persons as beneficiary, or directed the employee to make an irrevocable assignment to the person(s) named in the court order, for filing in the OPF. Court orders may not be faxed.

b) BEST must receive prior to employee's death.

c) Court orders submitted prior to 22 July 1998 must be resubmitted to be valid for FEGLI purposes.

2) CPF Action:

a) Advises employee that court orders take precedence over and supersede any prior designations made by the employee if filed with AFPC/DPCMB after 22 July 1998, but prior to the employee's death.

b) Encourages employee to mail a certified copy of court order to AFPC/DPCMB for filing in OPF.

3) AFPC/DPCMB Action:

a) Provides advisory service.

b) Upon receipt of certified court order (via mail), date stamps to show receipt.

c) Scans copy into administrative area of PARIS, "FLAG-FEGLI Court Order."

d) Files the original of the certified court order in the OPF.

e) Upon employee's death, forwards the original certified court order to the Office of Federal Employees Group Life Insurance (OFEGLI) along with other life insurance forms.

f) If employee submits SF 2823, Designation of Beneficiary, when he or she has a court order on file, DPCMB reviews to ensure it is completed properly, certifies receipt, scans copy into PARIS, and files original in OPF. Notifies the employee there is a court order on file and if it is determined to be valid by OPM, it will take precedence over any designation of beneficiary on file.

CERTIFICATION GUIDE - DESIGNATION OF BENEFICIARIES

1.	TSP-3	Thrift Savings Plan	Employee Completes & Retains Copy	Employee Submits to TSP Service Office		
2.	SF-2808	CSRS	Employee Completes & Retains Copy	Employee Submits to OPM		
3.	SF-3102	FERS	Employee Completes	CPF May Witness & Must Complete Agency Certification*	CPF Mails Original to AFPC/DPCMB and Gives Copy to Employee	AFPC Scans into PARIS & Retains Hard-Copy in OPF**

4.	SF-2823	Life Insurance	Employee Completes	CPF May Witness & Must Complete Agency Certification*	CPF Mails Original to AFPC/DPCMB and Gives Copy to Employee	AFPC Scans into PARIS & Retains Hard-Copy in OPF**
5.	SF-1152	Unpaid Compensation	Employee Completes	CPF May Witness & Must Complete Agency Certification*	CPF Provides Employee Copy, FAXs Original to AFPC/DPCMB & Destroys Original	AFPC Profiles Faxed Document into PARIS

* The reason for CPF agency certification is to establish the effective date.

**OPM requirement to maintain in hardcopy due to legal requirement for original signatures.

10. PRE-RIF PLANNING (Includes DSR, RIF, VERA, and VSIP)

a. Supervisor Action: Refers employee to the BEST automated phone system or EBIS web system (http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm) for general information and automated retirement estimates.

b. Employee Action:

1) Contacts BEST for retirement counseling once notice is received that he/she may be affected by reduction-in-force (RIF).

2) Reviews the document "Preparing for Retirement" on the BEST web site at <http://www.afpc.randolph.af.mil/dpc/BEST/retiring.htm>, or requests it via the BEST automated phone system (documents #2002).

3) Obtains retirement estimates from the BEST automated phone system or web automated system (EBIS). Employees who are firefighters, air traffic controllers, law enforcement officers, or retired military who are combining military and civilian service, should use the EBIS web system. Employees with non-appropriated fund (NAF) service, part-time service, civilian temporary service, civilian service for which a refund of retirement contributions was received, post-56 military service for which a deposit has not been made, or who elected to be covered under the FERS retirement system, should use the BEST automated phone system and speak with a benefits counselor. Employees are highly encouraged to contact BEST and speak with a benefits counselor regarding their retirement estimate.

c. CPF Action:

1) Faxes copies of MAJCOM Voluntary Early Retirement Authority (VERA) approval letters to AFPC/DPCMB at DSN 665-2936 or (210) 565-2936. NOTE: CPFs document VERA and VSIP approval on retirement RPA/SF 52.

2) Disseminates program information to employees regarding Command/Base VERA and VSIP authority and VSIP II participation.

3) Refers employees to BEST automated phone system or EBIS web system for general information and automated retirement estimates. Encourages employees receiving automated estimates to discuss them with a BEST counselor.

4) Provides AFPC/DPCMB via fax at DSN 665-3186 a copy of program information regarding VERA/VSIP and VSIP II.

a) Provides one copy of each letter type with list of employees' names receiving letter.

b) Includes the following statement, as applicable, in all letters: "If you wish to obtain a retirement estimate or speak to a benefits counselor for retirement advice, please contact AFPC/DPCMB at 1-800-997-2378, or if calling within the San Antonio area, commercial 527-2378."

d. AFPC/DPCMB Action:

1) Provides general information and advisory services.

2) Provides estimates through the BEST automated phone system or the EBIS web system.

3) Provides counselor-prepared estimate for employees who elected to be covered by the FERS retirement system, and for employees with one of more of the following: non-appropriated fund (NAF) service, part-time service, civilian temporary service, civilian service for which a refund of retirement contributions was received, or post-56 military service for which a deposit has not been made.

11. SURVIVORSHIP

a. Employee Death:

1) Supervisor Action:

a) Calls CPF immediately to notify of employee death.

(1) Provides name, phone number, and address of next of kin.

(2) Provides date and cause of death.

b) Creates and forwards electronic Request for Personnel Action (RPA) to the CPF. Includes the date of death on the RPA.

c) Initiates Condolence Letter.

2) CPF Action:

a) Upon notification of employee death, immediately provides the following information to AFPC/DPCMB:

- (1) Employee name and SSN.
- (2) Date and cause of death.
- (3) Name, phone number, and address of next of kin.
- (4) Workers' compensation claim numbers and dates of receipt of compensation benefits, if any.
- (5) Supervisor's name and phone number.

b) Coordinates on RPA and forwards through Modern DCPDS to DPCMB-ABE (AFPC, Benefits and Entitlements). Ensures date of death is on RPA.

3) AFPC/DPCMB Action:

a) Contacts next of kin by phone, providing the AFPC/DPCMB contact name and toll-free number 1-800-540-4047 so the survivor may contact AFPC/DPCMB at his or her convenience.

- b) Provides survivor benefits letter and claim forms.
- c) Provides advisory services and survivor annuity computations.
- d) Processes death claim forms.
- e) Completes and inputs RPA.
- f) Notifies OPM of death-in-service via fax or by E-mail link on OPM web site.
- g) Forwards appropriate package to DFAS, OPM, In Turn.
- h) Scans death case file to OPF area of PARIS.
- i) If the death was job-related, advises survivor he/she must choose between OWCP benefits or OPM survivor benefits. Refers survivor to the CPF with specific questions regarding OWCP benefits.
- j) Upon receipt of death certificate ensures that the date of death on the SF-50 is correct.

4) Survivor Action:

a) Completes claim forms and forwards to the appropriate processing office as per instructions in survivor benefits letter.

b) Attaches an original, certified Death Certificate to each claim. Also attaches other applicable documents, i.e., marriage or birth certificate(s), divorce decree(s), Court Order Appointing Executor of Estate.

b. Covered Family Member Death:

1) Supervisor Action:

a) Notifies CPF of family member's death immediately. Provides name, relationship, phone number and address of employee to CPF.

b) Initiates Condolence Letter.

2) **CPF Action:** Immediately contacts AFPC/DPCMB, on behalf of employee, with next of kin information and questions.

3) AFPC/DPCMB Action:

a) Contacts employee by phone if possible, and follows up with a letter to the employee, providing Form FE-6 DEP, Statement of Claim Option C-Family Life Insurance. Counsels employee regarding changing FEHB to Self Only and/or dropping FEGLI Family Option, if appropriate. Refers employee to BEST automated phone system or EBIS web system to make the changes, or conferences the call if employee needs assistance.

b) Provides advisory services.

c) Scans employee letter and Form FE-6 DEP into OPF area of PARIS.

4) **Employee Action:** Completes Form FE-6 DEP, attaches a certified death certificate, and mails directly to OFEGLI.

12. SES SERVICING

a. **Employee Action:** Obtains information or assistance and makes benefits elections through the BEST automated phone or EBIS web systems.

b. **CPF Action:** If employee contacts the CPF for assistance, CPF will provide the employee's name and commercial telephone number and AFPC/DPCMB will follow-up.

c. AFPC/DPCMB Action:

1) Makes initial contact with employee.

2) Provides appropriate servicing.

13. HEARING IMPAIRED CUSTOMERS

a. Employee Action:

1) Contacts BEST for assistance via TDD 1-800-382-0893 (or commercial 565-2276 if calling within the San Antonio area). May also obtain information and conduct transactions via the EBIS web system (http://www.afpc.randolph.af.mil/dpc/BEST_GRB/EBIS.htm).

2) Obtains, completes, and faxes the appropriate benefits form for processing to BEST at DSN 665-2936 or commercial (210) 565-2936.

3) Verifies projected actions through EBIS or the local CPF using the Civilian Servicing Unit (CSU) application, or through BEST via TDD servicing.

b. CPF Action:

1) Contacts BEST for counseling assistance.

2) Verifies projected action for employee using the Civilian Servicing Unit (CSU) application.

c. AFPC/DPCMB Action:

1) Processes counselor-assisted, on-line transactions.

2) Inputs actions into Modern DCPDS.

3) Relies on IVRS/EBIS/Modern DCPDS interface update to DFAS.

4) Scans actions into PARIS.

14. BENEFITS AND ENTITLEMENTS SUPPLEMENT (FOR ART POSITIONS ONLY)

a. Follow the benefits and entitlements procedures of this guide. The items identified below are the exceptions to be used in conjunction with those procedures in determining Benefits and Entitlements for ART positions. (The numbering system correlates to the main body of the guide.)

4. THRIFT SAVINGS PLAN

f. Out-Processing

2) CPF Action:

c) For ART employees who will be in a LWOP status to enter military duty, provides the handout “Information for Employees Entering Military Active Duty” which is available on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

5. HEALTH BENEFITS

g. FEHB Out-Processing Procedures

2) CPF Action:

e) For ART employees who will be in a LWOP status to enter military duty, provides the handout “Information for Employees Entering Military Active Duty” located on the AFPC DPC web site at <http://www.afpc.randolph.af.mil/dpc/BEST/bestbrochures.htm>.

7. VOLUNTARY CONTRIBUTIONS/DEPOSITS/REDEPOSITS/REFUNDS

d. Post-56 Military Deposit

1) Employee Action:

a) Contacts BEST with questions.

2) CPF Action: Refers employee to AFPC/DPCMB with questions.

3) AFPC/DPCMB Action:

a) Provides advisory services.

b) Upon request from employee sends forms by FAX or mail. Forms include RI 20-97, Estimated Earnings During Military Service; SF 2803 or SF 3108, Application to Make Deposit or Redeposit; and OPM Form 1514, Military Deposit Worksheet.

c) Provides employee with counseling and advises to send estimated military earnings request to the appropriate military finance office for verification.

d) Advises employee to hand carry or mail all documents to the local civilian payroll office or DFAS regional office IAW local procedures upon receipt of the estimated earnings.

e) If USERRA, computes two deposits: one based on civilian service and one based on military service. Provides to the employee with instructions to attach the lesser computation to the application for deposit and provide to DFAS.

8. RETIREMENTS

c. Discontinued Service (Involuntary Separation)

1) Supervisor Action:

b) (2) DSR example: “You have chosen to resign effective (date) in lieu of involuntary action. Therefore, you may be eligible for discontinued service retirement. Please be advised that only the Office of Personnel Management has the authority to make this determination. Should you withdraw your resignation, you will be separated effective (date).”

2) Employee Action:

d) (2) Forwards complete retirement package to include the Notice of Proposed Removal, Decision to Remove Letter, and hardcopy SF-52 (with signature on 2nd page) to BEST for processing.

*b. The information below is **supplemental** procedures for ART positions.*

1) **FOR ARTs ONLY**: Discontinued Service (Involuntary Separation Due to Mandatory Separation Date (MSD) for ART Officers and High Year Tenure (HYT) for ART Enlisted personnel).

a) **Employee Action:**

(1) Contacts BEST for counseling and retirement eligibility determinations.

(2) Obtains retirement estimates from the BEST automated phone system or web automated system (EBIS). Employees who are firefighters, air traffic controllers, law enforcement officers, or retired military who are combining military and civilian service, should use the EBIS web system. Employees with non-appropriated fund (NAF) service, part-time service, civilian temporary service, civilian service for which a refund of retirement contributions

were received, post-56 military service for which a deposit has not been made, or who elected to be covered under the FERS retirement system, should use the BEST automated phone system and speak with a benefits counselor. Employees are highly encouraged to contact BEST and speak with a benefits counselor regarding the results of any estimate received from the automated systems.

(3) Obtains a list of required retirement forms from the BEST web site at http://www.afpc.randolph.af.mil/dpc/BEST/retirement_forms.htm, or via the BEST phone system by requesting fax document #2010. Reviews the document "Preparing for Retirement" located on the BEST web site at <http://www.afpc.randolph.af.mil/dpc/BEST/retiring.htm>, or via the BEST phone line by requesting fax document #2002.

(4) Obtains retirement forms from the BEST web site (link above), the unit Organizational Representative, or the OPM web site at <http://www.opm.gov>. Form W-4P may be obtained from the IRS web site at <http://www.irs.gov>.

(a) Completes all the forms, to include a signed RPA/SF 52, Request for Personnel Action, documenting the employee's desire to retire.

(b) Forwards completed retirement package to BEST for processing. The package should include the Notice of Proposed Removal, the Decision to Remove, and the signed hardcopy SF 52/RPA.

(c) Retains a copy of all paperwork submitted to BEST.

b) CPF Action:

(1) Accomplishes PPP registration at least 13 months prior to High Year Tenure (HYT). HQ AFRC/DPCC registers ART Officers in the PPP who are subject to MSD separation. Employees must be registered in PPP for at least 12 months.

(2) Directs all inquires regarding retirement eligibility for ART personnel to AFPC/DPCMB for determination.

(3) Ensures Notice of Proposed Removal is given timely. May use HQ AFRC/DPCE Sample memo, subject, "Notice of Proposed Removal (Non-Disciplinary)." Proposed removal notices should be issued to employees 45 to 60 days prior to the effective date.

(4) Ensures Notice of Decision to Remove is given after response time to proposed notice has elapsed. Issues letter as soon as possible after the response time has elapsed, preferably 30 to 45 days prior to the effective date, to allow employee maximum time to apply for retirement. May use HQ AFRC/DPCE Sample memo, subject, "Notice of Decision to Remove (Non-Disciplinary)."

(5) Coordinates Notice of Decision to Remove Memo with HQ AFRC/DPCE prior to issuance.

(6) Provides OPM 1510 in all involuntary separation cases, including instances where the proposed separation notice is not timely issued and employee submits retirement application under DSR provisions. OPM will make the final decision regarding DSR eligibility.

(7) Directs all inquiries regarding the technical aspects and application of the MSD/HYT programs for ART employment to HQ AFRC/DPCE. Such inquiries would include those matters pertaining to loss of active membership in the Reserve unit of assignment.

c) AFPC/DPCMB Action:

(1) Determines adjusted MSD/HYT dates based on age and length of service in accordance with AFRC Instruction 36-114 and AFRC Instruction 36-201 - i.e., adjusted HYT date is earliest optional retirement eligibility date. MSD may be extended to age 55/20 years for CSRS employees; earlier of MRA/20 years or age 55/25 years for FERS employees. All military and/or civilian service that is potentially creditable with a service credit deposit should be included when determining these dates. Service that cannot ever be credited (e.g., FERS rules, non-deposit service beginning after 31 Dec 88) would not be used when determining dates.

(2) Provides advisory services.

(3) Processes retirement application and SF-52.

(a) Completes Certified Summary of Service (SF 2801-1 if CSRS, SF 3107-1 if FERS).

(b) Files hard copy SF 52 on right side of OPF.

(4) Processes retirement application through DFAS to OPM.

(5) Scans retirement case file to administrative area of PARIS.

(6) Provides OPM telephone numbers to retirees.

(7) Provides assistance to retired employees who are waiting to be placed in an interim pay status with OPM. Once OPM places retiree in interim pay status, retiree deals directly with OPM via their automated phone system (1-888-767-6738).

(8) Sends OPF to AFPC/DPCMP for forwarding to the NPRC.

d) HQ AFRC/DPCE Action:

(1) Coordinates on Notice of Decision to Remove memos.

(2) Responds to inquiries from CPFs regarding technical aspects and applications of MSD/HYT programs for ART employment.

(3) Responds to requests from AFPC/DPCMB for assistance in matters related to HYT/MSD.

15. Workers' Compensation

a. Employee Action:

1) Promptly notifies the CPF if any health benefits changes are submitted prior to the transfer of their enrollment to OWCP.

2) Submits health benefits changes to OWCP after AFPC/DPCMB transfers health insurance enrollment to OWCP.

3) Contacts the BEST automated phone system, enters the FEGLI module, and transfers to a counselor if desires to reduce or cancel life insurance, or elect Option C-Family coverage (due to a qualifying life event, during the first 12 months on LWOP for workers compensation. Do not use the EBIS web system.

4) After the first 12 months of LWOP for compensation, submits elections of Option C life insurance coverage, or elections to reduce or cancel life insurance coverage, to OPM on SF 2817.

b. CPF Action:

1) Submits RPA to the appropriate AFPC Staffing Team for employees who enter LWOP for worker's compensation. Initiates RPAs in all cases where LWOP lasts longer than 80 hours. (Note: Include the nature of action and authority code (Q3K - 5 CFR Part 353), and remark N10. This information is necessary to ensure employee receives full credit for the time on LWOP for compensation at retirement. It is also used to pull a DESIRE identifying employees reaching 12 months in a LWOP status for compensation.)

2) Processes OWCP claim forms. Ensures Section 10 of the employee's Form CA-7 (Claim for Compensation) is properly completed using data obtained from the Civilian Servicing Unit (CSU) application or PARIS. Verifies correct premiums are being withheld upon receipt of OWCP letter placing employee on periodic rolls. Submits corrected CA-7 to OWCP when FEHB/FEGLI is incorrect on the initial CA-7. (Note: Reporting an incorrect FEHB plan code will result in OWCP remitting premiums to the wrong insurance plan. This could cause the correct FEHB plan to cancel the employee's coverage due to failure to receive premiums.)

3) Faxes OWCP letter requesting transfer of health insurance to AFPC/DPCMB upon receipt at DSN 665-2936 or (210) 565-2936

4) Notifies AFPC/DPCMB if OWCP has not requested transfer of FEHB enrollment by the time the employee has been receiving compensation for 10 months. If provided by OWCP, faxes letter placing employee on periodic rolls to AFPC/DPCMB.

5) Notifies AFPC/DPCMB if the employee separates from service before OWCP requests the transfer of FEHB.

6) Notifies AFPC/DPCMB when an employee who has been on workers compensation returns to duty.

7) Upon receipt of OWCP transfer-out memo with original FEHB forms, prepares SF 2810 to transfer-in the enrollment. Mails the OPF copy of SF 2810 and the original FEHB forms to AFPC/DPCMB.

8) Prepares and submits RPA for return to duty. (Reminder: Include the nature of action and authority codes (Q3K - 5 CFR Part 353), as well as remark G11 with the from and through dates the employee was paid compensation. This information is necessary to ensure employee receives full credit for the time on LWOP for compensation at retirement.)

9) Refers employees to the BEST automated phone system for counseling regarding continuing FEHB and FEGLI while on LWOP for compensation and transactions during the first 12 months of LWOP for compensation. These employees should not use EBIS web system.

10) Provides AFPC/DPCMB requested documentation to process benefits-related actions.

11) Workers compensation specialists should counsel employees applying for compensation to notify the CPF promptly if the employee submits any FEHB enrollment changes prior to their enrollment being transferred to OWCP. Also advise employees AFPC/DPCMB will notify them when their enrollment has been transferred to OWCP.

12) Refers employees on workers compensation who wish to elect Option C life insurance coverage or reduce/cancel coverage to AFPC/DPCMB to speak with a benefits counselor for advice and assistance.

c. AFPC Staffing Team Action: Processes RPAs for LWOP and RTD.

d. AFPC/DPCMB Action:

1) Provides advisory service to employees.

2) Requests documentation needed to process benefits-related actions from the CPF.

3) Transfers FEHB enrollment to OWCP upon receipt of OWCP letter requesting transfer. Provides copy of transfer document to appropriate DFAS regional office, the employee, and to the CPF for filing in the compensation case file. Scans transfer document and FEHB forms into PARIS.

4) Contacts OWCP to determine the status of workers compensation claim upon advisement by CPF that employee has separated or been on LWOP for 10 months and OWCP has not requested transfer of FEHB. If compensation continues beyond separation date or after 365 days LWOP, transfers the enrollment to OWCP. Provides copy of transfer document to the appropriate DFAS regional office, the employee, and the CPF. Scans into PARIS.

5) Upon receipt from CPF, scans SF 2810 transferring-in FEHB enrollment into PARIS and files original FEHB forms in the OPF.

6) Runs a DESIRE each month to identify employees who have been in a LWOP status for workers compensation for 12 months. Calls CPF to verify employee has not returned to duty. Generates and authenticates SF 50 showing employee is ineligible for FEGLI coverage. Requests employee complete SF 2818 (Continuation of Life Insurance as an Annuitant or Compensation), if applicable. Prepares SF 2821 and SF 2819. Upon receipt of SF 2818 from employee, attaches to SF 2821 with all FEGLI forms in the OPF/PARIS and a copy of the SF 2819, and forwards to OPM. Provides employee with original SF 2819 and copy of SF 2821. Scans all documentation into PARIS. (Note: If SF 50s for LWOP/workers compensation are not processed with the proper nature of action code, authority code, and remarks, employees will not show up on the DESIRE.)