



UNITED STATES OFFICE OF PERSONNEL MANAGEMENT
Washington, DC 20415

The Director

Wednesday, October 8, 2008

MEMORANDUM FOR: Chief Human Capital Officers

FROM: Michael W. Hager, Acting Director

Subject: Administration of Retirement Program

This is to remind you of shared responsibilities in the administration of the retirement program.

- OPM sets policies, develops guidance, and provides training and tools to agencies.
- Agencies process benefits actions and provide day-to-day administration and communications with employees.
- Federal employees review their records to ensure they are complete and accurate.

The “Agency Checklist” (attached) will be helpful in ensuring a complete retirement application. This checklist is for the employing office as well as the payroll office. If agencies are diligent in including each item on the checklist in the retirement package, retirees will receive their retirement benefits more quickly.

We are taking several steps to improve retirement application records. We are reviewing the agencies’ submissions for completeness and accuracy and will provide feedback to each agency to improve quality control processes.

Employees need to review their Official Personnel Folder (OPF) to ensure there is complete and accurate information in their OPFs. Initially the focus should be on employees within five years of retirement.

In January there will be a Retirement Application Process Symposium for agency benefit officers focusing on the shared roles in the retirement process. They will gain a full understanding of the information we need in a complete retirement application, why it is needed and the consequences when it is not provided. We will also share some of the best practices developed by agencies.

I urge you to emphasize the importance of our partnership in this effort and to undertake reviews of your internal retirement application processing to provide us with complete and accurate applications in a timely manner. We would like to hear your comments or suggestions on how to improve the process. Ray Kirk is our point of contact for this and he can be reached at raymond.kirk@opm.gov or 202-606-0792.

Attachments:

[SF-2801, Application for Immediate Retirement \(CSRS\)](#) - Skip to Agency Checklist on Schedule D section of this form.SF-3107

[Application for Immediate Retirement \(FERS\)](#) - Skip to Agency Checklist on Schedule D section of this form.