Appendix G – ERR and SSR Examples for Preliminary Disability Retirement

The preliminary disability retirement business examples are intended to depict realistic employee scenarios to demonstrate the type of information to provide when an employee applies for a disability retirement, the relationships between data elements, and how repeating fields can be used. The examples only reflect a subset of the retirement data elements that may be provided when an employee applies for a disability retirement, as applicable to the scenario. The summary of service record is also included for each example and is expected to be provided when an employee applies for a disability retirement.

In the first example, the employee is a 58 year old General Tax Attorney for the IRS, starting at a GS-13 and promoted to a GS-14 a year later. The employee has been diagnosed with Type I diabetes for the past 33 years. As the disease progressed, the employee began to suffer from advanced kidney disease and started dialysis treatment 2-3 times per week. The employee is currently on the wait list for a kidney transplant. Once dialysis treatment started, the employee changed from a full-time to a part-time work schedule, with a 48/80 tour of duty. The treatments ultimately left the employee too physically and mentally drained to continue working in her current position. After eight (8) months of dialysis treatment and working on a part-time basis, the employee applied for a disability retirement. The employee had 20 years of FERS service at the time of application and is not considered terminally ill. OPM approved the disability retirement application three (3) months after the application date.

The first business example demonstrates how an Agency would complete four data feeds: (1) the ERR for preliminary disability, (2) the SSR for preliminary disability, (3) the ERR for final disability retirement, and (4) the SSR for final disability retirement.
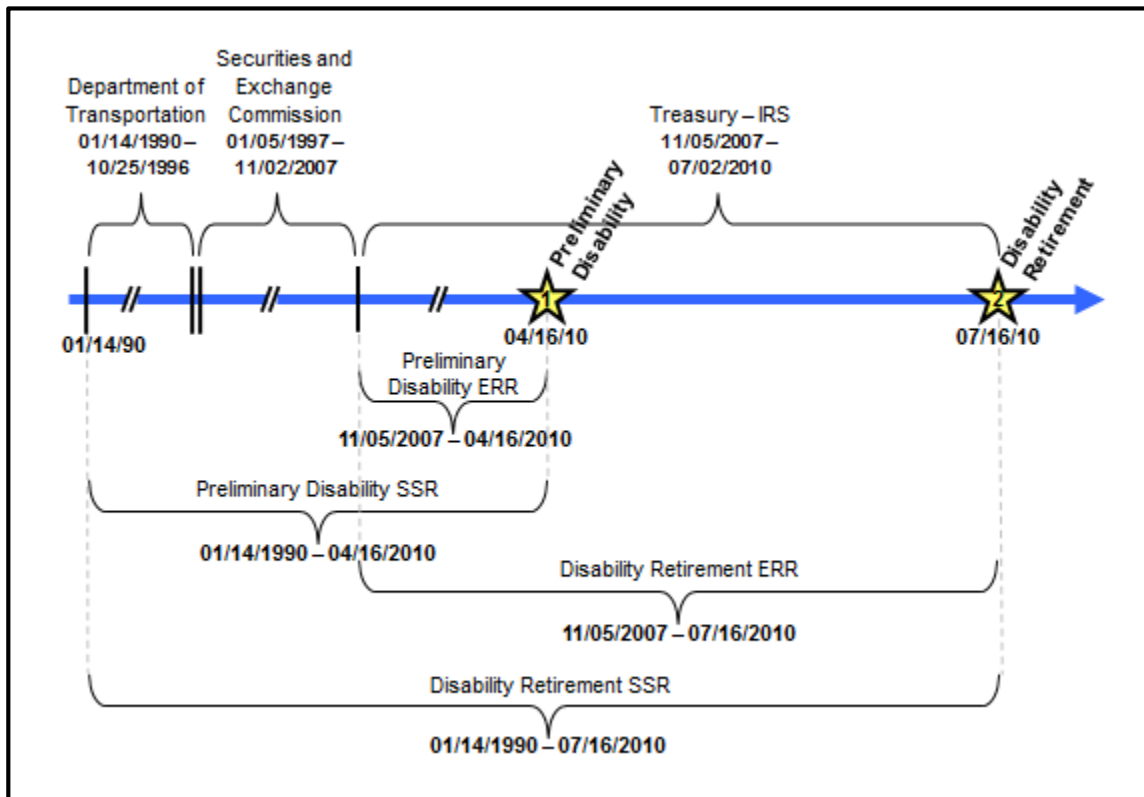
Figure 11: Timeline for Preliminary Disability Retirement Example #1

The second business example is similar to the first example except that the employee dies in service on July 2, 2010 before her disability retirement application is approved by OPM. In addition, the Agency took a week to close out the retirement record after the application date; the fiscal details contain an additional week of retirement deductions. All other details are the same.

This example demonstrates how an Agency would complete four data feeds: (1) ERR for preliminary disability, (2) the SSR for preliminary disability, (3) the ERR for death-in-service, and (4) the SSR for death-in-service.
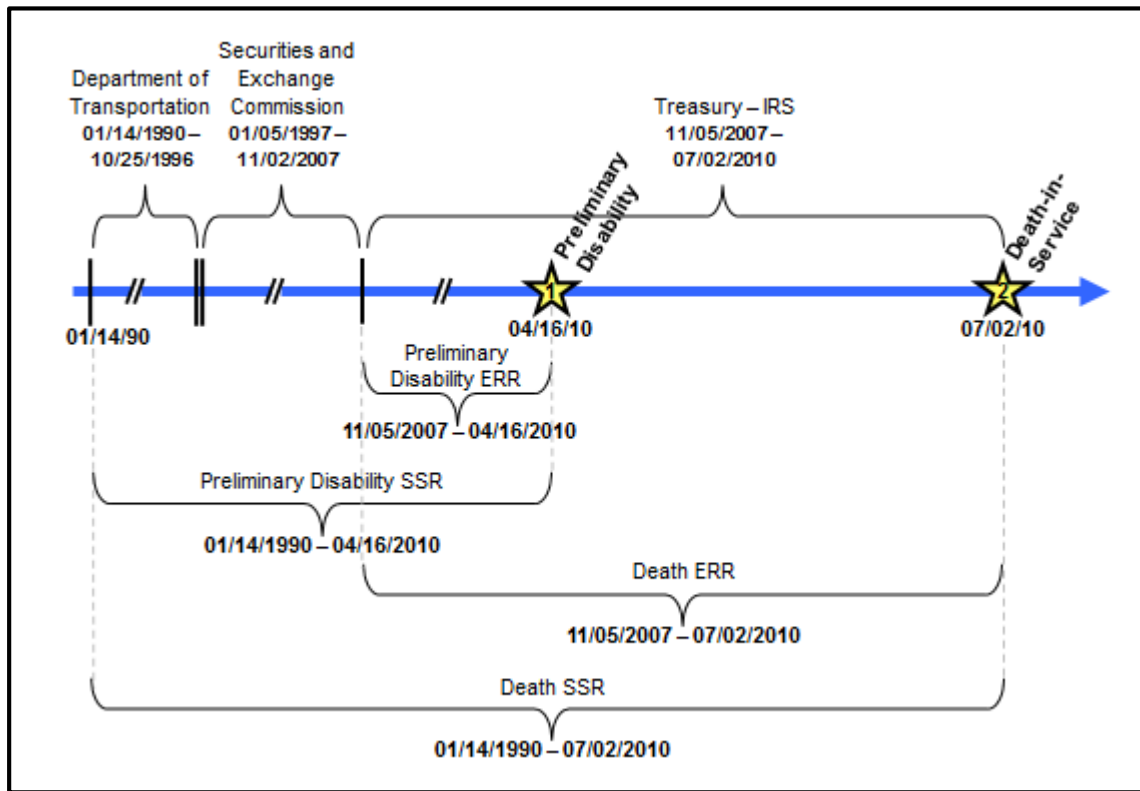
Figure 12: Timeline for Preliminary Disability Retirement Example #2

The examples are provided in Excel and XML.

The Excel versions can be found using the following links:

http://www.opm.gov/policy-data-oversight/data-analysis-documentation/enterprise-human-resources-integration/retirement-reporting/preliminary-disability-example-ex1.xls

http://www.opm.gov/policy-data-oversight/data-analysis-documentation/enterprise-human-resources-integration/retirement-reporting/preliminary-disability-example-ex2.xls

The XML versions can be found using the following links:

http://www.opm.gov/policy-data-oversight/data-analysis-documentation/enterprise-human-resources-integration/retirement-reporting/preliminary-disability-example-ex1-1.xml

http://www.opm.gov/policy-data-oversight/data-analysis-documentation/enterprise-human-resources-integration/retirement-reporting/preliminary-disability-example-ex2-1.xml