

# SURVIVOR'S MILITARY SERVICE ELECTION

## Deceased Employee Covered by CSRS or CSRS Offset

Part A - To be completed by employing agency				
1. Employee's name		2. Date of birth	3. Social Security number	
4. Is survivor eligible for an annuity based on the minimum basic annuity?  <input type="checkbox"/> Yes (Complete item 4a) <input type="checkbox"/> No, annuity will be based on actual service		4a. If item 4 is "yes" would loss of credit for post-1956 military service reduce the amount of the annuity?  <input type="checkbox"/> Yes <input type="checkbox"/> No		
5. Was a deposit account opened for the employee? <input type="checkbox"/> Yes, complete information below <input type="checkbox"/> No				
Period of Military Service		Amount due (with interest)	Amount paid by employee	Balance due
From	To			
6. Agency records show the above named deceased employee was first employed under the Civil Service Retirement System (CSRS) and had post-1956 military service for which a deposit has not been made or has not been completed. <input type="checkbox"/> before October 1, 1982 <input type="checkbox"/> on or after October 1, 1982				
7. Agency representative to contact for information			Telephone number	
8. Agency personnel office address to which form should be returned			Election must be received by (date)	
Part B - To be completed by survivor				
<p>Our records indicate that you might be eligible for a civil service annuity. You have the right to make a deposit for the deceased employee's post-1956 military service. Your decision may affect your rights under CSRS. Read the attached "Information for the Survivor of a Deceased CSRS Employee..." carefully to be sure you understand the consequences of not making the deposit for military service. Then make your election, sign and date the form, and return two (2) copies to the address shown in item 8 above. If you have decided to pay the deposit, we will provide you with the necessary information. Payment must be made in a lump sum to this agency before the Office of Personnel Management completes its adjudication of your application for survivor benefits.</p>				
<p><b>Survivor Election</b> - I have read the information concerning my right to make a lump sum deposit to the decedent's employing agency for post-1956 military service.</p>				
<input type="checkbox"/> I elect to make (or complete) the deposit to the employing agency for the decedent's post-1956 military service. I understand that this deposit must be paid to the agency in a lump sum. ( <b>Note:</b> The election may be changed at any time before the deposit is actually paid to the agency.)		<input type="checkbox"/> I elect not to make (or complete) the deposit for post-1956 military service. I understand this decision is irrevocable.		
Part C - To be completed by survivor of deceased employee in receipt of military retired pay at the time of death				
<p>If the deceased employee received military retired or retainer pay that was (1) <b>not</b> awarded because of a service-connected disability incurred either in combat with an enemy of the United States or caused by an instrumentality of war and incurred in the line of duty during a period of war, or (2) awarded under reserve retiree provisions (chapter 67 of title 10, United States Code), you will receive credit for the military service subject to the rules for post-1956 military deposits. However, if you do receive credit for military service (including any pre-1957 military service), your CSRS survivor benefit must be reduced by the amount of any military survivor benefits payable to you. In some instances, it may be advantageous to receive a survivor benefit including the military service in the computation. In order to advise you about the survivor annuity benefits, we need to know if you are eligible for military survivor benefits. Your documentation or verification of your entitlement to military survivor benefits should be attached as indicated.</p>				
<input type="checkbox"/> I have attached verification of my eligibility or ineligibility for military survivor benefits. (Specify monthly amount, if known \$ _____.)				
<p><b>Survivor Election</b> - To exclude military service from the computation of your survivor annuity, etc., check the appropriate box below.</p>				
<input type="checkbox"/> I elect to exclude the decedent's military service from my survivor annuity.		<input type="checkbox"/> Other (Specify here or on a separate sheet of paper).		
Signature			Date	

**Information for the Survivor of a Deceased CSRS Employee  
About Service Credit for Post-1956 Military Service**

Because your decision about completing the deposit for or including the deceased employee's military service in the survivor annuity computation may affect your rights under the Civil Service Retirement System (CSRS), you need to be aware of the following information.

**A. If The Deceased Employee Was First Employed Under CSRS *Before* October 1, 1982**

**1. *Optional Deposit***

- a. If you qualify at the employee's death for social security survivor benefits based on his or her service, you have the option of either making the deposit and the post-1956 military service will be included in the CSRS survivor annuity computation, or not making the deposit and the post-1956 military service will be excluded from the CSRS survivor annuity computation.
- b. If you will qualify at a future date for social security survivor benefits based on the decedent's service, post-1956 military service will be included in the computation of your CSRS survivor annuity until you become entitled (or would upon application be entitled) to social security benefits. You have the option of either making the deposit now and avoiding the reduction in your CSRS survivor annuity, or not making the deposit and having your CSRS annuity adjusted to exclude post-1956 military service when you become eligible for social security benefits based on the decedent's service.

**2. *Eligibility for Social Security***

A survivor of a deceased employee may be eligible for social security survivor benefits if the employee was "fully insured" and the survivor is (a) the parent of an eligible child, (b) age 50 or over and disabled, (c) age 60 or over, or (d) a divorced spouse age 62 or over. For information about your present or future eligibility for social security survivor benefits, contact the Social Security Administration. NOTE: If you become ineligible for social security survivor benefits based on the deceased employee's service (e.g., by becoming eligible for social security benefits based on your own earnings which exceed the survivor benefits), you should contact OPM. You may be eligible to have the military service restored to the survivor annuity computation.

**B. If the Deceased Employee Was First Employed Under CSRS After September 30, 1982, no credit is allowed for post-1956 military service unless a deposit is made for the service.**

**C. Factors that May Affect Creditability of Military Service Regardless of When the Deceased Was First Employed**

**1. *Minimum Basic Annuity Provisions***

If you are eligible for a CSRS survivor annuity based on the minimum basic annuity provisions of the law, it is possible that the exclusion of credit for post-1956 military service will have no effect on the amount of your annuity. (See items 4 and 5 in Part A of this form. If you need more information about how you may be affected, contact the decedent's employing agency representative in item 7 of Part A of this form.

**2. *Effect of Military Retired Pay***

- a. If, at the time of death, the employee was receiving military retired or retainer pay that was (1) awarded because of a service-connected disability incurred either in combat with an enemy of the United States or caused by an instrumentality of war and incurred in the line of duty during a period of war, or (2) awarded under the reserve retiree provisions (chapter 67 of title 10, United States Code), you will receive credit for the military service subject to the provisions for military deposit for post-1956 military service.

- b. If, at the time of death, the employee was receiving military retired or retainer pay that was not awarded under either of the two exceptions noted in C.2.a. above, you will also receive credit for the military service subject to an important difference in the computation of the benefits described below. (1) If your deceased spouse arranged for you to receive a military survivor benefit, your CSRS survivor benefit will be reduced by the amount of the military benefit. Since this reduction will never be greater than the value of the military service under the CSRS benefit computation, you are not disadvantaged by this requirement with respect to your CSRS benefit. (2) If you feel that it is not to your advantage to include the military service in the computation of your CSRS survivor benefit, you may send OPM your written election not to include the military service in your CSRS survivor annuity computation now. (See Part C of "Survivor Election.")

**D. Information About Deposit for Military Service**

1. The amount of deposit is 7 percent of military basic pay (plus interest, if any).
2. If the deposit is made, the post-1956 military service will be credited under both the civil service and the social security systems, if it is otherwise creditable.

**E. If You Are the Survivor of a Reemployed Annuitant**

1. If the deceased employee was reemployed while annuity payments were continuing and had less than 5 years of service as a reemployed annuitant at the time of death, you are not eligible to make a deposit for the military service.
2. If the deceased employee had 5 or more years of service as a reemployed annuitant and you elect a recomputation of the annuity under the law in effect at the time of death, you may make a deposit for post-1956 military service. However, if you elect a recomputation of the annuity, a deposit must also be made to cover any of the decedent's service as a reemployed annuitant for which no retirement deductions were made. Before you make your deposit ask the decedent's employing office for information about how a recomputation will affect your annuity.

**F. If You Elect To Pay the Deposit**

1. If you do not have sufficient documentation of military basic pay earnings for the employing agency to determine the amount due, the agency will tell you how to obtain an estimate of earnings from the branch of military service in which the decedent served.
2. You should make payment to the agency as soon as possible. The agency will not delay processing of your application for death benefits while you are waiting to receive an estimate of military earnings from the military service. If you have not made the deposit before the agency sends the application to OPM, the agency will tell OPM that you plan to pay the deposit.
3. In order to credit your deposit, OPM must receive documentation of your payment from the agency before your application is completely adjudicated.
4. If you elect to pay the deposit, but later decide not to do so, promptly notify the employing agency and OPM in writing so that OPM can complete final adjudication of your application for survivor benefits.