



Phased Employment/Phased Retirement Status Elections

General Instructions for Employee:

Read the information regarding Phased Employment/Phased Retirement elections carefully before completing any of the election forms in this package.

To Elect Phased Employment/Retirement Status:

- ☐ Complete the election in Part 1A and obtain the consent of the appropriate agency official. Also complete the *Application for Immediate Retirement (Civil Service Retirement System) or (Federal Employees Retirement System)*, Standard Form 2801 or Standard Form 3107, as appropriate. **Note:** Read the special instructions pamphlet for completing the application for immediate retirement pertaining to Phased Employment/Phased Retirement elections.
- ☐ Return Part 1A of the election form and the *Application for Immediate Retirement* to your employing agency's Human Resource Office or Benefits Office.
- ☐ Complete deposits for post-1956 military service, if applicable, before the effective date of Phased Employment/Phased Retirement. See *Service Credit: Post-1956 Military Deposit* section for more information.
- ☐ Your employing agency will file a copy of your election in your Official Personnel Folder (OPF or e-OPF), and forward a copy of the election, along with your application for immediate retirement and appropriate payroll records to the Office of Personnel Management (OPM). OPM will then calculate and begin paying you your phased retirement annuity.

To Elect to End Phased Employment/Retirement to Return to Regular Employment Status:

- ☐ Complete the election in Part 2A and obtain the consent of the appropriate agency official.
- ☐ Return Part 2A of the election form to your employing agency's Human Resource Office or Benefits Office.
- ☐ Your employing agency will file a copy of your election in your Official Personnel Folder (OPF or e-OPF), and forward a copy of the election within 15 days of the election to the Office of Personnel Management (OPM). OPM will terminate the phased retirement annuity.
- ☐ Note, if you receive any phased retirement annuity payments after the effective date of your election to end Phased Employment/Phased Retirement, the payments must be immediately returned to OPM.

To Elect to Continue Phased Employment/Retirement Upon a Move to Another Agency:

- ☐ Complete the election in Part 3A and obtain the written consent of the appropriate agency official in the agency where you are transferring to. Submit the Part 3A of the election form to your current agency's (that is, the agency you are leaving) Human Resource Office or Benefits Office.
- ☐ Your current employing agency will file a copy of your election in your Official Personnel Folder (OPF or e-OPF), and forward a copy of the election to the Office of Personnel Management (OPM).

To Elect to End Phased Employment/Phased Retirement Status Upon a Move to Another Agency:

- ☐ Complete the election in Part 3B and submit it to your current agency's (that is, the agency you are leaving) Human Resource Office or Benefits Office.
- ☐ Your current employing agency will file a copy of your election in your Official Personnel Folder (OPF or e-OPF), and forward a copy of the election to the Office of Personnel Management (OPM).

Privacy Act Statement

Solicitation of this information is authorized by title 5, United States Code, Chapter 83 (Section 8336a) and Chapter 84 (Section 8412a). The information you furnish is needed to document your election of phased retirement status and will be used to determine and allow present or future benefits, to identify records properly associated with your election, and to maintain a uniquely identifiable claim file. The information may be shared, and is subject to verification, via paper, electronic media, or through the use of computer matching program, with national, state, local or other charitable or Social Security administrative agencies to determine and issue benefits under their programs. In addition, to the extent this information indicates a possible violation of civil or criminal law, it may be shared and verified as noted above, with the appropriate Federal, state or local law enforcement agencies. Executive Order 9397 (November 22, 1943) authorizes use of the Social Security number as an individual identifier to distinguish between people with the same or similar names. Failure to furnish the requested information may delay or prevent action on your election.