



### CHECKLIST FOR SEPTEMBER 2016 LIFE INSURANCE OPEN SEASON

- Verified my current FEGLI life insurance coverage**
  - On my agency's human resources portal (if my agency offers one), OR
  - Using Box 27 of my most recent SF 50 Notification of Personnel Action, OR
  - Asking my agency's human resources office for a copy of my most recent Standard Form SF 2817
  - Used the FEGLI Calculator at [www.opm.gov/life](http://www.opm.gov/life)
- Figured out how much coverage I want**
  - Considered how much money I want to leave for my family to pay final expenses, rent/mortgage, debt, tuition, etc.
  - Considered whether I want Option C coverage on the lives of my spouse and eligible children
  - Used the FEGLI Calculator at [www.opm.gov/life](http://www.opm.gov/life)
- Learned the essential information**
  - I understand that if I'm satisfied with my current FEGLI coverage, I do not need to submit an election during the Open Season
  - I understand that my Open Season coverage will be effective no sooner than October 2017 following a one-year delayed effective date
  - I understand that I must meet pay and duty status requirements before my Open Season coverage can come into effect
  - I understand that I will not pay premiums on my new coverage until my new coverage comes into effect
  - If I plan to retire before October 2022, I understand that for any types or multiples of coverage I want to bring into retirement, I must have that coverage throughout my last five years of Federal service, or my entire period(s) of service if I retire with less than five years
  - Because coverage elected during the FEGLI Open Season will be effective no sooner than October 2017, if I want to bring my Open Season coverage into retirement, I understand that I must retire in October 2022 or later, five years after the coverage becomes effective



### CHECKLIST FOR SEPTEMBER 2016 LIFE INSURANCE OPEN SEASON

- Completed my election**
  - On my agency's online human resources portal, if my agency offers a portal that accepts FEGLI enrollment changes, OR
  - Using Standard Form SF 2817, available at [www.opm.gov/FEGLIopenseason](http://www.opm.gov/FEGLIopenseason)
  - Elected all the FEGLI coverage I want to have, not just the coverage I want to increase, because any coverage not elected is waived/cancelled
- Submitted my election**
  - September 1, 2016 through September 30, 2016
  - Using my agency's online portal, OR
  - Submitting my paper SF 2817 election form to my agency's human resources office, after checking with my human resources office about how elections can be submitted
- Confirmed my agency's receipt**
  - Received a confirmation of my election from my agency's online portal, OR
  - Received a copy of my SF 2817 election from my agency's human resources office with a receipt date in Part 6
- Reviewed my current designated beneficiaries**
  - Checked my current designation using my agency's online human resources portal (if applicable) or asking my human resources office for a copy of my most recent SF 2823
  - Determined if I need to make changes or updates, knowing that I can submit a new designation at any time (no need to wait for an Open Season)
  - Submitted a new SF 2823 (available at [www.opm.gov/life](http://www.opm.gov/life)) to my agency's human resources office, if I need to make changes
  - Received confirmation of receipt from my agency