Online Retirement Application

Human Resources Specialist Guide

US OFFICE OF PERSONNEL MANAGEMENT (OPM)

RETIREMENT SERVICES

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Introduction

The Online Retirement Application (ORA) resource guide is created to assist the HR Specialist in serving future retirees. The Job Aid walks the HR Specialist through the ORA workflow. The document provides short, detailed instructions for Adding New Applicants, completing the Pre-Application/Retirement Application, Certified Summary of Service (CSOS), the HR Checklist process, resolving Discrepancies and more.

General Workflow

Login

- 1. Use the following link to log into ORA Sign in · OPM Online Retirement Application
- 2. Link your ORA account to your Login.gov account (first time only) or sign in
- 3. Create digital signature PIN (first time only) that will be used to certify forms within ORA

Create applicant account & Complete Pre-application

- 4. From the HR Dashboard select New Applicant Profile to add a new applicant. ORA will send applicant an automated email that their account has been created.
- 5. Complete the Pre-application. This will initiate the workflow and provide the applicant with the correct retirement application to complete.

Complete Certified Summary of Service (CSOS) & Retirement Application Review

- 6. Complete the Certified Summary of Service in tandem with the applicant completing their retirement application. This is the first opportunity to upload supplemental documents that will be required for the application package. The applicant will be able to see documents that you upload.
- 7. The retirement application must be in a "ready for payroll" status before the CSOS can be certified by HR. This means HR must approve/finalize the **retirement application and all applicant uploaded documents first**.
- 8. Once HR finalizes CSOS, the applicant will review and approve the CSOS.

Complete HR/Employing Office Checklist

- 9. When the Retirement Application and CSOS are both in a "ready for payroll" status, the checklist will be available to complete. This is the second and final opportunity to upload supplemental documents that are required for the application package.
- 10. Certify entire package to payroll for further processing. All sections will be in a "ready for payroll" status. Once the package is assigned to a payroll specialist, the status will update to "in payroll review". The status will update to "Submitted to OPM" when processed by payroll.



Adding New Applicants

- 1. Please note the applicant may need to link their personal email address to their Login.gov account to view and complete the application.
 - a. From the HR Dashboard, enter the New Applicant information (see images below)

Onine Retrement Application				HR Level 2 -	HR Dashboard	Help Privacy Act	Sharnetta Hicks +
HR Das	hboard						
Manage retire	e applicant profiles using t	the provided list. Open an a	cant record to review and manage retirement applications, pre-applications, certified summary or	f service, and HR checklist records.			
First Name	Last Name	Date of Birth	Social Security Number				
Filter							
Billy Active As	olicants-			1.1	0	ew Applicant Profile	

Figure 1 Adding the Applicant in ORA

b. Then click Save.

New Applicant

First Name		Middle Name [optional]
Sanaa		
Last Name		Suffix (optional)
Lathan		
Personal Email More Info		Personal Email (Confirmation)
sanalathan®ithostmail.com Date of Birth and Social Security Number		sanaalathan9ithostmail.com
sanakithaniiyhootmal.com Date of Birth and Social Security Number Date of Birth 00/251970		sanaalathan®ithoatmail.com
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Pre-application

Drafting Pre-Application

This image below shows the status of the application from the HR Side, prior to the completion of the Pre-Application

- The Pre-Application is still in Draft.
- The HR Specialist has Not Started the Certified Summary of Service



I My Active Applic	<u>cants</u> •										New Applicant Profile
<u>Full Name</u>	Department	Agency	<u>Last</u> Activity Date_↓	<u>Pre</u> Application Status	<u>Retirement</u> Application Status	<u>Certified</u> <u>Summary</u> <u>of</u> <u>Service</u> <u>Status</u>	<u>HR</u> <u>Checklist</u> <u>Status</u>	<u>Payroll</u> <u>Checklist</u> <u>Status</u>	<u>Projected</u> Retirement Date	<u>Last</u> <u>Successful</u> Login	HR Notes
<u>Sanaa Lathan</u>	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	9/30/2024 9:49 AM	Draft	Not Started	Not Started	Not Started		1/30/2025		



Complete the cards below listed as **Not Started** (entering the relative information pertaining to the applicant)

- a. Federal Service
- b. Retirement Type and Provisions
- c. Applicant Address
- d. Finalize Pre-Application (CSRS or FERS, and Voluntary Retirement) Do you want to release the Pre-App to the applicant.
- e. If you select **Yes** (the HR Specialist has the option to choose to **Begin the Certified Summary of Service (CSOS)** and release the Application to the applicant.
 - 1. The Applicant will receive another email advising the retirement application is available for completion.
 - 2. The information completed by the HR Specialist will automatically populate for the Applicant's convenience.
 - 3. The option to finalize Pre-Application and complete the Certified Summary of Service is given at this point.

Pre-Application		💄 <u>Sanaa Lathan</u>
Select a section to continue your application.		Draft
Federal Service Please provide details on the Applicant Federal Service.	Not Started	Go
Retirement Type and Provisions Please provide information on the Applicant Retirement Type and Provisions.	Not Started	Go
Applicant Address Please provide Applicant Address information.	Not Started	Go
Finalize Pre Application Finalize the Pre Application and grant access to the Applicant.	Not Started	Go
		Back to Applicant

Figure 4 Completing the Pre-Application Cards



Pre-Application		🙎 <u>Sanaa Lathan</u>
Application Overview	Finalize Pre Application	Draft
Federal Service	HR Sections Completed	
Retirement Type and Provisions	Finalize the Pre Application and release to Applicant?	
Applicant Address	Begin Certified Summary of Service [optional]	
Finalize Pre Application		Back Save Save and Next

Figure 5 Finalizing the Application and Option to complete the CSOS

• If you select **No** the Certified Summary of Service will not be an option from this page. Additionally, the applicant will not receive access to their application because the Pre-Application has not been finalized. No email will be sent to the applicant.

Pre-Application		🙎 Sanaa Lathan
	Finaliza Dra Application	Draft
Application Overview	Finalize Pre Application	
Federal Service	HR Sections Completed	
 Retirement Type and Provisions 	Finalize the Pre Application and release to Applicant? Ves No	
Applicant Address		
Finalize Pre Application		Back Save Save and Next
	Figure 6 The Option to Complete the CSOS Not Present	

The Status of the Pre-Application

The image below shows the application status from the HR Side, prior to the completion of the Pre-Application

- The Pre-Application is still in **Draft.**
- The HR Specialist has **Not Started** the Certified Summary of Service.

IMy Active Appl	icants -										New Applicant Profile
<u>Full Name</u>	<u>Department</u>	Agency.	<u>Last</u> <u>Activity</u> <u>Date</u> ↓	Pre Application Status	Retirement Application Status	<u>Certified</u> <u>Summary</u> <u>of</u> <u>Service</u> <u>Status</u>	<u>HR</u> <u>Checklist</u> <u>Status</u>	<u>Payroll</u> <u>Checklist</u> <u>Status</u>	<u>Projected</u> <u>Retirement</u> <u>Date</u>	<u>Last</u> <u>Successful</u> Login	HR Notes
<u>Sanaa Lathan</u>	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	9/30/2024 9:49 AM	Draft	Not Started	Not Started	Not Started		1/30/2025		

Figure 7 The Status of Each Stage in the Application



The Applicant Dashboard

Preview Status for the Unfinalized Pre-Application



After HR Specialist has added the applicant account but has not completed the Pre-Application.

Figure 8 The Applicant Dashboard is Greyed-out

• Please note the applicant has no cards/task to complete until HR takes the next step to Finalize the Pre-Application; the greyed-out feature on the Dashboard indicates no action required at this time.

The Applicant Receives the Email Invite to Complete the Application

The applicant has received the automated email stating their application is ready for completion, now that the Pre-Application in ORA has been completed by the HR Specialist.





• The Applicant Dashboard shows the application status, and the card displays a Retirement Application (blue link) for the Applicant to take the next step in the Pre-Application process.



My Dashboard

Please review your applications(s) below. A Certified Summary of Service will be provided by your agency HR representative. Once it has and you verify the accuracy of the summary, your application will be returned to the representative to continue the process.

My Retirement Application(s)				
Name	Status	Modified On	Created On 🕹	
Sanaa Lathan - Retirement Application - SF-2801 (CSRS/CSRS Offset)	Not Started	10/2/2024 4:05 PM	10/2/2024 4:04 PM	٢

Figure 10 The Application is Available for the Applicant



	Review and verify your summary of Federal service.
	Certified Summary of Service
	There are no records to display.
L	

Figure 11 The HR Specialist Has Not Started the CSOS

Completing the Certified Summary of Service (CSOS) The HR Specialists takes the steps to complete CSOS.

• The Pre-Application status is Finalized.

			Has the Applicant				
Name	Status 🛧	Applicant	received retirement counseling?	Retirement Plan	Type of Retirement	Created On 🔶	
Sanaa Lathan - SF-2801 (CSRS/CSRS Offset)	Finalized	Sanaa Lathan	Yes	SF-2801 (CSRS/CSRS Offset)	Voluntary Retirement	8/27/2024 2:54 PM	C

Figure 12 View of the Finalized Pre-App on the HR Side of ORA

• The Retirement Application is awaiting Applicant completion.

Name	Status	Modified On	Created On 🔸	
ianaa Lathan - Retirement Application - SF-2801 (CSRS/CSRS Offset)	Not Started	10/2/2024 4:05 PM	10/2/2024 4:04 PM	
ertified Summary of Service				
Certified Summary of Service	Status	Modified On	Created On 🍁	

Figure 13The HR Specialist Starts the CSOS While Waiting for the Applicant to Take Next Steps

• The HR Specialist can now complete the **Certified Summary of Service** CSOS card by clicking the available link and completing the following task: (Please note that, the CSOS cannot be finalized until the application is submitted by the applicant and approved by HR)



- a. Identification
- b. Verified Service History
- c. Document Uploads
- d. Review and Certify

Verified Service History Control Market Activation Control								
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HR Application Review and Completion of CSOS

• The applicant has completed the Retirement Application (Applicant view)



My Dashboard



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/ly Retirement Application(s)				
Name	Status	Modified On	Created On V	
Sanaa Lathan - Retirement Application - SF-2801.(CSRS/CSRS Offset)	Certified and Submitted for HR Review	10/3/2024 9:42 AM	10/2/2024 4:04 PM	C

Figure 15 The Applicant Completes the Retirement-App and Submits to HR

• The HR Specialist will receive the email notification once the Applicant certifies the Retirement Application



Figure 16 HR Specialist Notified When the Application is Complete



• Similarly, the applicant will receive an email explaining the next steps in the certification process.

ÿ	SPM
	Dear Sanaa
	Your retirement application was reviewed by an DHS Headquarters HR representative and approved.
	You will receive a separate notification as soon as the Certified Summary of Service is completed by the DHS Headquarters HR office and is ready for your review.
	For questions regarding your retirement application and submission process, please contact your HR Representative.
,	Thank You,
,	Customer Service
	DDM U.S. Office of Perconnel Management
	Online Retirement Application

Figure 17 Applicant Updated on Application Status

• The **Retirement Application Status** will be listed as **Certified and Submitted for HR Review** by the Applicant and is now ready for HR Review

Overviwe											
I≣ My Active Applicants -											
Full Name	Department	Agency.	<u>Last</u> <u>Activity</u> <u>Date</u> ↓	<u>Pre</u> Application Status	Retirement Application Status	<u>Certified</u> <u>Summary</u> <u>of</u> <u>Service</u> <u>Status</u>	<u>HR</u> <u>Checklist</u> <u>Status</u>	<u>Payroll</u> <u>Checklist</u> <u>Status</u>	<u>Projected</u> Retirement Date	<u>Last</u> <u>Successful</u> Login	HR Notes
<u>Sanaa Lathan</u>	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	10/3/2024 9:42 AM	Finalized	Certified and Submitted for HR Review	In HR Review	Not Started		1/30/2025		

Figure 18 Application Status Updates Overview



Update the Applicant Profile details in the form fields provide below. In th	w sections below, you can manage the Retire	ment Applications and Pre Applications, Certifie	d Summary of Service, and HR Checklist records for th	is.Applicant.				
nems which require your amendan will be shown acuted and nucleon.								
Applicant Details								
First Name				Middle Name (optional)				
Derail								
Last Name				Seffix (optional)				
Weshington								~
Work Email								
sharretta hicko-applicant/lenarity/Topen.itor								
Date of Birth								
65/28/2962								
Is Applicant a citizen of the USP (R) This () The								
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Figure 19 ORA Manages the Applicant Details

Retirement Application				
Name	Status	Modified On	Created On	
Sanaa Lathan - Retirement Application - SF-2801 (CSRS/CSRS Offset)	Certified and Submitted for HR Review	10/3/2024 9:42 AM	10/2/2024 4:04 PM	۲

Figure 20 The Retirement Application Status Update

The HR Review Process

- Click the Retirement Application
- Then click the HR Review Card or Go

Retirement Application - SF-2801 (CSRS/CSRS Offset)		Lenzel Washington
Select a section to continue your application.		Certified and Submitted for HR Review
HB Roview		6
<mark>identifying Information</mark> Vew you personi information and pat senses social Social Security Numbers.	Completed	6
Federal Service Provide information regarding your past Tedent Service.	🕑 Complexed	۰
Marital Information Procedo referencian regarding para cannet and part mortuges.	Completed	



- The HR Specialist shall review the entire application and verify all information.
- The HR Specialist will need to click the caret or down arrow and select Review for each document uploaded by the applicant.
- Click Next to review and approve the uploaded documents.



• Note there is a discrepancy that will be automatically resolved when application is approved. These represent any changes made by the applicant to the data HR entered in the Preapplication.

pplication	- SF-2801 (CSRS/CSRS Offset)					Ă	Denzel Washington
_						Certified a	and Submitted for HR Review
HR	Review						
-	As part of the applicant's Retirement Application workflow	n, HR Specialists are required to review and rejec	I/ approve all documents uploaded by the applicant that have	a status of "Under HR Review".			
_							
Discri	epancies						
Piece	RRAISX, I		Pre-Application Value	Petireme	nt Application Value	Section	
n Applic	ant Address City		New Yo	New York		Enderal Service	
20 C							
HR Do	ocument Review						
	Approval of the applicant's Retirement Application is not a	allowed while there are applicant uploaded docur	nerts with an upload status of 'Under HR Review' or 'Rejected	e.			
Pacur	ment.Topp	Comments	Suborded.Bx	Meload States	Created On	Modified On.+	
<u>10-4 - 1</u>	Imployee's Withholding Allowance Certificate		Denzel Washington	Under HR Review	18/22/2024 13:06 AM	15/22/2024 11:56 AM	0
W-IP-	Withholding Certificate for Pension or Annuity Payments		Denzel Washington	Under HR Beview	38/22/2024 13:00 AM	30(22/2024 13:06 AM	٥
Marria	ste Certificate / Tribal Law Docs / Common Law (1201)		Denzel Washington	Under HR Review	10/22/2024 11:12 AM	10/22/2024 13:16 AM	٥
ST 283 or Con	III - Continuation of Life Insurance Coverage as an Annultant spensationer		Denzel Washington	Under HR Review	30/22/2024 13:34 AM	18/22/2024 11:36 AM	٥
Previ	ous HR Reviews						
Theo	e are no records to display.						
Withd	drawal Requests						
Theo	e are no records to display.						

Figure 22 Reviewing the Uploaded Documentation

Document Approval/Rejection

If the document is rejected by the HR Specialist, then the HR Specialist will need to manually reject the application; the Specialist will no longer have ability to approve the application. The application automatically goes back to the applicant for corrections and recertification, then is sent back to HR to recertify as well.

Review and approve each document link to make sure the correct document has been uploaded by the Applicant.

D View details	×
Under HR Review V	
Documents	
Each time you attempt to upload a document type, the following rules apply: You may upload up to 5 documents(PDF only). Each document cannot exceed a maximum size of 5MB. You must upload at least one document. 	- I
about.7.hours 380 Sanaa Lathan	
Remarks [optional]	
Review	Ļ

Figure 23 Document Specifications and Type for Review



• After clicking Review the HR Specialist will receive another pop-up modal advising the specialist to **Cancel** or **Approve** the document upload

20		C Retirement	Application OPM Onli	x +					-	Ø	×
← 0	1	https://opmi	iretirestage.powerap	psportals.us/retirement-app-loader/?id=f4e73482-f980-ef11-a671-001dd8024617&form=R Q	\mathbb{A}^{p_i}	☆	Ф	£'∎	~		٠
← 0		Https://opmi View details	Review	ppportakus/retirement-app-loader/?d=/4672482 980 eff11-a671-001d880246178dom=R. Q	×		×		8		

Figure 24 Entering the Reject Reason for the Uploaded Document or Clicking Approve or Cancel

Crew details Constant Constan	opmiretiretage.powerappsportals.us says Vour changes haven't been saved. Would you like to stay on the page to save your changes? OK Cancel		
W.A. Frederica Withholder Allowance Cartificate	Denial Waltergton Under Hill Review	10/22/2024 11.06 AM 10/22/202-	41016 AM

Figure 25 Saving your Selection Upon Selecting Approve

Adding Comments to the Document Upload Section

• Click Approve and enter any necessary comments.

Approve			×
	Approve Approv	k	
	रूग भ	prove	

Figure 26 Approval Comment Box

Click OK



Approve		×
Approve Co Attocum	y e Edont. An you wan you want to general to defense of speluate? There are any discogeneric, approving will assore the speluar to only a poly of poly. you application, and center to ensure of any discogeneric discovery of tension. Be a set to approve the defense of speluar to the set of a special set of the speluar to only of tension. Be a set to approve the defense of the set of the set of the special set of the set of the set of the special set of the special set of the set of the special set of the set of th	Land
Canot		Proceeding

Figure 27 Approving the Retirement Application

• After approving the uploaded documents, the Upload Status will show as Uploaded.

					Certified a	nd Submitted for HR	Revie
Application Overview	HR Review						
HR Review							
Identifying Information	As part of the applicant tha	applicant's Retirement thave a status of "Une	der HR Review".	ecialists are required to re	view and reject / approve all	documents uploaded by th	e
Federal Service							
Marital Information	Discrepancies						
Annuity Election							
Insurance Information	Discrepancy 🛧		Pre-Application Value	Retirem	ent Application Value	Section	
Other Claim Information	Birth Date		9/25/1975	9/25/1970		Identifying Information	
Unmarried Dependent Children	HR Document Rev	iew					
Direct Deposit and Tax Withholding Information							
Document Uploads	Document Type	Comments	Uploaded By	Upload Status	Created On	Modified On V	
Review and Certify	SF 2818 - Continuation of Life Insurance Coverage as an Annuitant or Compensationer		Sanaa Lathan	Uploaded	10/3/2024 9:39 AM	10/3/2024 5:15 PM	
	W-4 - Employee's Withholding Allowance		Sanaa Lathan	Uploaded	10/3/2024 9:38 AM	10/3/2024 5:03 PM	[

Figure 28 The HR Document Upload Status Update

cation - SF-2801 (CSRS/CSRS Offset)					Lenzel Washing		
					Ready for Payroll F		
Approved by HR You can now go to the Centilled Summary of Service to cent	By and send to applicant.						
You can continue to track the retirement application packs	ge via your dashimani up ontil it is submitted to 094.						
HR Review							
As part of the applicant's Retrement Application workflow,	PR Specialistic are required to review and reject / approv	e all documents uploaded by the applicant I	at here a status of "Under HR Review".				
Discrepancies							
There are no records to display.							
HR Document Review							
Document Tree	Correnants	University De	Stringel Status	Created On	Modified On +		
52 2018 - Continuation of Life Insurance Company as an Annufact or Company advance		Derial Nedhington	Upforded	10/22/2024 11-24 404	11/12/2004 11-12 AM		
Manage Certificate / Trilai Law Docu/ Common Law prody		Deniel Washington	Upkaded	35/22/3024 11:32.494	12122024 1240 AM		
W-87- Withholdes Certificate for Pension or Annats Parenets		Deraid Mashington	Uploaded	25/22/2024 11:35 AM	15/12/2004 15:42 AM		
W-4 - Englover) W0 Addis Allowarce Certificate		Deroid NetNington	Uployded	30/22/2024 11:00 AM	11/12/2014 11:39 AM		
Previous HR Reviews							
Created On +	Betirement Application	Mill Review Decision	Comments				
11/12/2020 11:52 AM	Аррения		All documents have been verified				
Withdrawal Requests							
There are construction dialogy							
There are no movies to angrep.							

Figure 29 Using the Navigation Panel and Button to Complete the CSOS



• Click Review and Certify

Certified Summary of Service - SF-2801 (CSRS/CSRS Offset)		🚨 Denzel Washington
Select a section to continue your application.		In HR Review
Identification Productionships grademation regarding the features.	Completed	60
Varialist Service History Werfiel Service Teary Documented or Oflicat Resona.	Completed	60
Recument Uselands Decement Useda for 10.	Campleted	٥
Review and Cently Review of centy,	😯 in Progress	6

Figure 30 Completing the Review and Certify Card

• Click Proceed to Certification

Certified Summar	y of Service - SF-2801 (CSRS/CSRS Offset)	🔔 Denzel Washington
		In HR Review
Application Overview	Review	
Identification	The Certified Summary of Service cannot be certified by the 149 Sociality until the following are completed:	
Verified Service History		
Document Uploads	Certified Summary of Service	
Review and Certify	R4 Sections Completed	
Agency Certification	Retirement Application	
	Retrement Application Solumited to HR Retrement Application Approved by HR	
	Discregancies	
	Non-second de de tra	
		Back Proceed to Certification

Figure 31 The Three Check Boxes Needed to Certify

- Complete the CSOS an then click Certify and Send to Applicant
- The email has been sent to the applicant advising the HR Specialist completed the CSOS.

,	
Agency Certification	
I certify that the information on this form accurately reflects certified information contained on the official personnel and/or payroll records in the custody of this agency and that if retiring, the ret	king employee has sufficient service to support title to an immediate annuity. I further certify that all required documentation in support of this application is attached, accurate, and complete.
Nation States	Signature Date
3harreta nicks	11/12/2024
Signature PN foreid New PN1	
Official Table	
HR Specialist	
Agency Address (Central Office)	
Thermational Address (optional)	
Country	
UNITED STATES	~
Line 1	
1300 E street	
Least for a first for a first	
Core x (alassisa)	
Line J (optional)	
Cty	
Hollywood	
State	
CALIFORNA	~
Pudal Code	
90210	
Agency Contact Information	
Azercy Telephone Number Morre Ido	International Telephone Number (optional)
222-222-2222	
Agency via Number (sphont)	international Pax Number (optional)
222-223-3333	
Agency Email Address	
shameta hicks-118 Room.azz	

Figure 32 Checking the "I certify box..." Before Sending to the Applicant

Click Next



Certified Summary	of Service - SF-2801 (CSRS/CSRS Of	ffset)				Lenzel Washington
						In Applicant Review
Application Overview Application Overview Identification Verified Service History Document Uphaeds	Submitted to Applicant for Review Tracertified Summary of Service hasheen set to the app You can continue to track the retirement application pack Applicant Overview HI Dashboard	plicant to noview and approve. age vie your devisioned up until it is submitted to OPM.				
Review and Certify	Applicant Review					
Applicant Review and Certify Next Steps	Identifying Information					
	First Name					
	Denzel					
	Last Name					
	Washington					
	Social Security Number					
	XXX-XX-1111					•
	Birth Date					
	05/19/1962					
	US Citizen					
	Tes					*
	Service Computation Date for Retirement Purposes					
	01/01/1995					
	Occupational Series					
	0020 · Community Planning (Occupational Category:P; Functiona	al Classification:X)				
	Pay Plan					
	65					
	Other Questions					
	Military Retired Pay					
	No					~
	Verified Service History					
	Verified Service History					
	All Service -					
	From Date 🔶	To Date 🛧	Federal Agency/Hilitary Branch	Name of Retirement System	Nature of Action	Comments
	1/1/1995	1/25/2025	DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT - Assistant Secretary for Public Affairs	CSRS	Appointment	

Figure 33 This is the Applicant View of the Review and Certify Process

The Finalized Retirement Application

The Retirement Application is now Finalized, and status shows Ready for Payroll Review

Retirement Application <u>Status</u> Modified On Created On Name Sanaa Lathan - Retirement Application - SF-2801 (CSRS/CSRS Offset Ready for Payroll Revi 10/3/2024 6:38 PM 10/2/2024 4:04 PM ۲ Certified Summary of Service Created On Modified On Name Status Sanaa Lathan - Certified Summary of Service - SF-2801 (CSRS/CSRS Offse In Applicant Review 10/3/2024 6:56 PM 10/2/2024 4:04 PM ۲

•	To view click HR Dashboard
---	----------------------------

Application Event Logs					
Form	Assignee	Version	Event Status	Comments / Remarks	Event Date / Time 🛧
HR Pre-Application	Sharnetta Hicks		Finalized	Applicant Retirement Package Created	10/2/2024 8:05 PM
Retirement Application	Sanaa Lathan		In Applicant Review		10/3/2024 1:19 PM
Retirement Application	Sharnetta Hicks		Certified and Submitted for HR Review	Initial Submission to HR	10/3/2024 1:42 PM
Retirement Application	Sharnetta Hicks		Ready for Payroll Submission	The documents have been reviewed and the application is now complete.	10/3/2024 10:39 PM
Certified Summary of Service	Sanaa Lathan		In Applicant Review		10/3/2024 10:56 PM

Figure 34 The Retirement App, the CSOS, and The Event Log



The Applicant Logs into the Portal to Finalize the CSOS

Signing and Submitting the Retirement Package

- The Retirement Application displays as In Payroll Review
- The CSOS states In Applicant Review
- The applicant will click the CSOS link to certify.

My Dashboard				
	Apploities Labeliantical and the payment of the pa	Appropriate a statement of the statement		
ar neverse year applications (c) before. A Contified Summary of Service will be provided by your agency HR representative. Once it h	, and you welly the accuracy of the summary, your application will be returned to the representative to continue	the process.		
My Retirement Application(s)				
Name	Status	Modified Str	Sciented On V	
Omanf Handleytan - Referencest Application - 57-2011 (CSRS CVIRS Offset)	Ready for Psyculi Broiew	11/12/2024 11:52 AM	10(22)0624 10:17 AM	٥
Terview and verify your summary of Federal service.				
Certified Summary of Service				
Name +	Aeros JR Bay Durretta Hicka	Satus In Applicant Review	Created On	٥
	Abadati IDA Battatta Insector General II	necentier 1584aur booutbilte		·

Figure 35 The Applicant Portal View as ORA Keeps the Applicant Informed

• Then the applicant will click the Applicant Review and Certify link or Go

Certified Summary of Service - SF-2801 (CSRS/CSRS Offset)		Lenzel Washington
Select a section to continue-your application.		In Applicant Review
Kentification Productorlying elementar square give future.	🕑 tanjani	•
Yeeffield Service Hitlery Welfard Issues History Documental's Official Namedia	Company	•
Becament Violands Transmittigatadu et R.	C tangand	8
Review and Cently None well cently	C tangand	8
Analisant Review and Cartify Systext may noise and artify the Cartific Learney of Lease.	() to thread	60
	santarianan' Maacadar Udaar Aunadah I I I I I I I I I I I I I I I I I I I	

Figure 36 The Incomplete Applicant Review and Certify Card

• The Applicant will click Next.



Certified Summar	ry of Service - SF-2801 (CSRS/CSRS Offset)	🚨 Denzel Washington
		In Applicant Review
Application Overview	Applicant Review	
Montification Montification Montifield Service History Dournet Uplace Review and Costly Applicant Review and Costly Applicant Review Agalant Interve	Second sing information Indiana Execond Second Se	•
	Executions Comparison Series GRI: Comparison Series Report Comparison Series Pay Tom Bi Other Questions Series Pay Series Pay Series Series Pay Series	~
	Verified Service History	

Figure 37 The Summary Prior to the Applicant

• If all information is documented correctly, the applicant will click approve

Certified Summar	ified Summary of Service - SF-2801 (CSRS/CSRS Offset)					
			In Applicant Review			
Application Overview	Applicant Certification					
Verified Service History	Review your history of approvals / rejections.					
Document Uploads Devices and Certific	Applicant Approval/Rejection History					
Applicant Review and Certify	There are no records to display.					
Applicant Review						
Applicant Certification		Back Bank	Reject Approve			

Figure 38 The Applicant Approves the Certification

- Check the acknowledge box and enter the Signature Pin
- Then click Certify

Approve		× elp Pri
Summ	Note: Fyru have performed Federal alles service subject to scalar leavely deduction. FO(1) or not subject to indenent deduction, He are they para gency bes survely completed the Federal of Califies Service National Systems for Service and a survey). This fees that subject to accelerate service of the Alifies Service Service and a survey) and survey). This fees that subject to accelerate service of the Alifies Service Service and a survey). This fees that subject to accelerate service of the Alifies Service Service and a survey). This fees that subject to accelerate service and a survey of the Service Service and a survey of the Service Service and the Service Service Service Service and the Service Se	el Was
	Approve Connects (sptonul)	In Appli
Dvenvlew	All Information Is correct	_
rice History		
plands	I i demodelandi of the series field is consider.	
Certify	Concentration and a set of the dot man indexed and a set of t	
Review and	Derad Washington 11/12/2024	
	Signahar PM Teget (Sur Fin)	
et Roview		
nt Certification		Reject
	Casal Cashy	

Figure 39 The Applicant Certifies, Signs electronically by entering a PIN

• Click OK to Submit

Please note that, the HR Specialist will automatically receive the notification email advising applicant certified



Approve			×
	Note: If you have performed Federal civilian service subject to social security deductions (FICA) or not subject to retirement deductions, be sure that your agency h	as correctly completed the Details of Civilian Service Not Subject to Contributory Retirement System for Civilian Federal Employees section. If you have active military service	
	on or after January 1, 1957, for which you have not made a deposit, be sure to read the Military Service Information section for information on how this affects you	r annuity. You cannot change your decision after you retire.	
	Reserve Mercerente (sectore)		
	Approve Comments (optional)		
	All information is correct		
	I acknowledge that the service listed is complete.		
	Name	Date of Signature	
	Denzel Washington	11/12/2024	
	Signature PIN Forest Your Pin?		
	Cancel	Processing	



- Click the Applicant Dashboard in the top lefthand corner
- Click Next

	Certified Summar	ry of Service - SF-2801 (CSRS/CS	RS Offset)						🚨 Denzel Washingt	on
									Ready for Payroll Rev	riew
	Application Overview Identification Verified Service History Document Uploads	Ready for OPM Submission The Certified Summary of Service has been appr You can continue to track the reterment applicat Applicant Ostabased	roved by the applicant. Agency HR and Poyvall offices tion package via your dashboard up until it is submit	will continue to itruitze the retirement application package for sub- ted to OPM.	mission to OPM.					
~	Review and Certify Applicant Review and Certify	Applicant Certification								
	Applicant Review	Review your history of approvals / rejections. Applicant Decision								
		Approve Remarks [optional]								
		Per rend memory in controls								
		Applicant Signature (optional)				Date of Signature				_
		Denzel Washington				11/12/2024				
		Service Selection [optional]								_
		The service listed is complete							~	_
		Applicant Approval/Rejection History								
		Applicant Decision	Date of Signature	Applicant Signature	Service Selection	2	Approve Comments	Rejected Reason	Created On V	
		Autom	11/12/2024	Denzel Washington			All information is correct		11/12/2024 2:19 PM	۰
					Back Next					

Figure 41 The Application is Approved and Certified

Note that, the status for the CSOS states ready for PR review in the top righthand corner.

Certified Summary of Service - SF-2801 (CSRS/CSRS Offset)		<u>Denzel Washington</u>
Select a section to continue your application.		Ready for Payroll Review
<mark>Mentification</mark> Provide identifying exformation regarding the flattere.	🕑 Completed	6
Yerlind Service History Wetled Involution Plant Reserve.	Completed	6
Bocument Uselands Document Uselands for IR.	Completed	8
Review and Certify Notes and certify.	Completed	60
Applicant Beview and Certify Applicant may more and write the Certific Diamonary of Stockie.	Complete	60
abactórn föra hattathat i	transformet theorem vieller kannaktion OPM	

Figure 42 The Applicant Completed the Application Workflow



My Dashboard

	Applications Applications Applications MA Approval MA	April 2 Scholard Is Factor Market Market Presser Market Market		
Please review your applications(s) below. A Certified Summary of Service will be provided by your agency HR representative. Once it has and you verify the ac	curacy of the summary, your application will be returned to the representative to continu	e the process.		
Mu Batiroment Application(s)				
my neurement Application(5)				
Name	Status	Modified On	Created On V	
Denzel Weskington - Peticement.Application - 57-2801 (CSEs:CSES Office)	Ready for Payrull Review	11/12/2024 11:52 AM	10/22/2024 10:17 AM	٥
Review and verify your summary of Federal service.				
Certified Summary of Service				
Nation T Descrief Workington - Certified Summary of Service - SF-2001 (CSRS)/SBS Offset)	Sharnetta Hirks	Brach for Paural Brainw	10/22/2024 10-17 AM	
				•
	About OPM FOIA No FEAR Act Inspector General P	thiscypolicy USA.gov Accessibility		
	@ OPM			

Figure 43 Ora Updates the Application to keep the Applicant Informed

HR Checklist

The Retirement Application and the status for the CSOS are ready for PR Review and the HR Checklist is In HR Review

HR Dashboard	IR Dashboard											
Manage retiree applicant profiles using the pr	Racepteries explicate publies using the provided like. Open an application and manage entirement applications, per-applications, and IR checklik records.											
First Name Last Name T Filter Filter	First Name Last Name Date ef Birch Social Society Number V V V Trans V V											
III Hy Active Applicants+												O New Applicant Profile
Full Name	Department	Agency	Last Activity Date	Pre Application Status	Retirement Application Status	Certified Summary of Service Status	HR Checklist Status	Payroll Checklist Status	Projected Retirement Date	Last Successful Login	HR Notes	
Denzel Washinston	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	11/12/2024 2-20 PM	Finalized	Ready For Payroll Review	Ready For Payroll Review	In HR Review		1/25/2025			

Figure 44 The HR Dashboard Updated to the Most Recent Status

- Click the name of the desired applicant.
- Scroll to the HR Checklist and click the link with the applicant's name.

HR Checklist				
Name	Status	Modified On	Created On +	
Denzel Woshington - Employing Office Checklist - SF-2801 (CSRS/CSRS Offset)	In HR Review	11/12/2024 2:20 PM	11/12/2024 2:20 PM	۲

Figure 45 The Clickable Link for the Applicant



• Click the link labeled Applicant.

memerit App	saan		
HR	Checklist - SF-2801 (CSRS/CSRS Offset)		Denzel Washington
5	elect a section to continue your application.		In HR Review
	Applicant Understand the upplicate and information should be informere.	😯 la Progress	60
	Decement Unleads Vew ord galard discusses to the application.	tot Started	60
	Checklint Verly divisions: Lawrence are provided and appropriate actions: Index.	In Not Started	60

Figure 46 Incomplete HR Checklist Cards

• Enter the Retirement Information by answering the questions.

HR Checklist - SF-	Checklist - SF-2801 (CSRS/CSRS Offset)				
		In HR Review			
Application Overview	Retirement Information				
Applicant	Type of Relievenst				
Identifying Information	Wurdary Rationaid	~			
Retirement Information	Occupational Series				
Document Uploads	8031 - Community Planning (Booupadional Catelory P. Functional Claudification)	*			
Checklist	Pay Ran				
	×				
	Coverage				
	In the applicat slighter a continue Tet the average is referenced?				
	(DBI neighbi Reason				
	Does not meet the qualifications				
	Is the applicant eligible to continue PEGL soverage in referement?				
	○ Yes ● No				
	I Gil Intelgior Reason				
	Does not meet the qualifications				
		Back Save Save and Next			
	Allow LDPM 1208 No.1767.8xx3 Insertic Seneral, Princerolary Lideway Accessibility				
	Made 🐘				

Figure 47 Applicant Overview -Retirement Information

HR Checklist - SF-	2801 (CSRS/CSRS Offset)	Lenzel Washington
		In HR Review
Andiration Decoders	Patirement Information	
Applicant	Recti entersi. International	
 Identifying information 	Wardary Retrieved	~
Retirement Information	Transfered Series	
Document Uploads	0030 - Community Planning Roccostdianal Category P. Functional Disordination 0	v
Checklist	PayPlan	
	۲ (۲۰۰۵) ک	
	Coverage	
	h the applicate digible to contract FDB Coverage in retirement?	
	Land - BLUE CASS AND BLUE SHELD SERVICE BEHET-SELF ONLY	~
	h the audicard elebha to continue FEGU coverage in rotionment?	
	(e) Ha O No	
	asic Life insurance Options	
	No optional insurance © option A- surancial	
	open - Additional	
		Back Save Save and Next
	disout DPM IEEA to Institution Insector Sector Udator Sectorial	
	® i∂PM	

Figure 48 Applicant Overview Contd.



Required Document(s) Upload

Upload the required document(s) by clicking Add Document. The HR Specialist must review and all document uploads. (Note: The Agency Annuity/Benefits Estimate is missing, this is just one example of a required document)

HR Checklist - SF-	2801 (CSRS/CSRS Offset)						Denzel Washington
Application Overview	Document Uploads						In HR Review
Applicant Document Uploads Checklist	Upload any required documents. here, You may work with your HS Specialist to get You may upload any to SPOF documents. Each document carrent occare a maximum size of SMS. You must upload at least one document.	t your documents uploaded. Note: Each time you attempt to uplo	aid a document type, the following rules apply:				
	Documents required for this application						
	Agency Annuity / Benefits Estimate					Not Uploaded	
	Marriage Certificate / Tribal Law Docs / Common Law proofs					Vploaded	
	SF 2818 - Continuation of Life Insurance Coverage as an Annuitant or Compensationer					🕑 Uploaded	
	Select Add Document to spload a document for this application.						
	Documents Submitted						
	All Upfoaded Documents-						Add Document
	Document Type	Comments	Uploaded By	Upload Status	Created On	Modified On 🔶	
	W-4 - Emoloyee's Withholding Allowarce Certificate		Denzel Washington	Uploaded	10/22/2024 11:06 AM	11/12/2024 2:20 PM	
	W-4P - Withholding Certificate for Pension or Annuity Parements		Denzel Washington	Uploaded	10/22/2024 11:10 AM	11/12/2024 2:20 PH	
	Marriage Certificate / Tribal Law Docs / Common Law proofs		Denzel Washington	Uploaded	30/22/2024 13:32 AM	11/12/2024 2:20 PM	
	SE 2018 - Continuation of Life Insurance Coverage as an Annultant or Compensationer		Denzel Washington	Uploaded	10/22/2024 11:14 AM	11/12/2024 2:20 PM	
	I do not have any additional documents to add.						
	Warning: This section will remain in progress until this button is checked.						
							Back Save Save and Next

Figure 49 Required Document Upload

- a. The HR Specialist will land on the Document Uploads page.
- b. The Documents required for this application card is not editable. Note the user will need to upload any required documents. (see fig. 50)

Documents required for this application	
Agency Annuity / Benefits Estimate	Not Uploaded
SF 2818 - Continuation of Life Insurance Coverage as an Annuitant or Compensationer	Vploaded

Figure 50 Document Not Uploaded - Alert-Grayed Out

- c. The HR Specialist will upload any additional documents formatted to a PDF file.
- d. If there are no additional document uploads, the HR Specialist will check the box "I do not have any additional documents to add". Please note the Warning, which states, "This section will remain in progress until this button is checked."



All Uploaded Documents -					Add Docum
ocument Type	Comments	Uploaded By	Upload Status	Created On	<u>Modified On</u> ↓
V-4 - Employee's Withholding Allowance Certificate		Sanaa Lathan	Uploaded	10/3/2024 9:38 AM	10/7/2024 2:06 PM
F 2818 - Continuation of Life Insurance Coverage as n Annuitant or Compensationer		Sanaa Lathan	Uploaded	10/3/2024 9:39 AM	10/7/2024 2:06 PM
o not have any additional documents to add.					
Warning: This section will remain in progress until	this button is checked.				

Figure 51 Warning to Check the No Additional Document Checkbox

- e. Then click Save and Next to proceed.
- Checklist

Please note this is image only a small portion of the **Checklist** as a quick reference. Some information will pre-populate.

HR Checklist - SF-2801 (CSRS/CSRS Offset)		Sanaa Lathan	
		In HR Review	
Application Overview	Employing Office Checklist		
Applicant	Use the following checklist to review the \$5 2801. Antication for Immediate Detirement (C\$RS) lincluding analizable Schedules A. R. and C) and \$5 2801-1. Certified Summary of Federal Service for completion		
Ocument Uploads	ose un neuming encontre to rettert the or apoly population for minimum encounter (carat pressuring oppressive activates) is so and systems administry or reaction of the compression.		
Checklist	Are the following documents attached or actions taken?		
	All documents applicant shows attached to \$F 2801, Application for Immediate Retirement (CSRS). ((S Ves O No O Not Applicable)		
	If applicant is married and elects less than the maximum survivor benefit, <u>SF2803-2</u> , Spouse's Consent to Survivor Election. Ves No Not Applicable		
	If applicant has military service, D0 214, Certificate of Release or Discharge from Active Duty, or its equivalent, if available. O Yes O No 🌒 Not Applicable		

Figure 52 Navigation Panel Progress Displays Progress

- a. The HR Specialist will answer the remaining questions on the **HR Checklist** by clicking **Yes**, **No**, **Not Applicable**, or **Sent to OWCP**. (the entire page is editable)
- b. The HR Specialist will receive an error message and cannot proceed unless all questions are answered. (clicking the blue link(s) listed in the error message will direct the HR Specialist to the unanswered question)

The form could not be submitted for the following reasons:	
hecklist: Counseled, SF 1515 is a required field, hecklist: Agency Estimates Attached is a required field, hecklist: Former Shouse Docs Attached is a required field,	

Figure 53 Resolving the Errors to Progress

c. When all questions are correctly answered click Save and Next to proceed.



Figure 54 Notification the HR Checklist is Complete



d. The HR Specialist will land on the Certification page to complete the final step for the submission of the Online Retirement Application (ORA) process.

Certification Steps:

- To certify the HR Checklist, check the boxes, complete the form, then click Certify and Submit to Payroll
- The HR Specialist will answer the required questions on the Certification page.
 - a. The Specialist will check the "I certify that the above accurately reflects..." and the "I acknowledge that certifying the application without..." check boxes. (see fig.55)

(Certification
	Offenses Barring Annuity Payments: Public Law 87-299 prohibits payments of annuity to persons who have committed specified offenses involving the national security of the United States. Employing agencies are responsible for submitting all pertinent information to the Office of Personnel Management, Retirement Services, in any case when this law possibly applies.
•	I certify that the above accurately reflects verified information in official records and that the applicant has sufficient service to be entitled to an annuity. I further certify that all required documentation in support of this application is attached, accurate, and complete. I acknowledge that certifying the application without all required documentation will result in delays or failure of processing the retirement application package submitted to OPM.

Figure 55 The Certification Checkboxes

b. Next enter your Signature PIN, if you have forgotten the PIN click the **Forgot Your PIN** link to reset.

Signature PIN	Forgot Your PIN?		
••••			

Figure 56 Electronically Signing Using the Selected PIN

- c. The employment information: address, telephone, etc., for the HR Specialist must be entered in the required fields.
- d. If all the required information is not entered the HR Specialist will not be able to proceed and will receive an error message.

• The form could not be submitted for the following reasons:	
Certification of application is mandatory.	

Figure 57 User Error Message Received for Missing Information

e. Click the Certify and Submit to Payroll button.

First Name	Middle Name (optional)
Shametta	
Last Name	Suffix [optional]
Hicks	~ ~
	Back Certify and Submit to Payrol

Figure 58 The Certification and Submission



f. The HR Specialist will receive the email notification indicating the retirement application package is complete.

© Đ	PM
Dear S	Sanaa,
The H repres	R Checklist for your retirement application package has been completed by an HR sentative. Your retirement application package is now under Payroll review.
You ca <u>Portal</u> .	an continue to access this retirement application package and its status on the \underline{ORA}
Thank	x You,
Custor	mer Service
O P	U.S.Office of Personnel Management
Online	e Retirement Application
Follow	us on <u>LinkedIn</u> <u>YouTube</u>

Figure 59 The Applicant Receives the Email Notification

g. After clicking the Certify and Submit to Payroll button the HR Specialist will note all sections of the HR Checklist are complete. The HR Specialist can now click the Applicant Overview or HR Dashboard button.

HR Checklist - SF-2	1801 (CSRS/CSRS Offset)	💄 <u>Sanaa Lathan</u>
		Ready for Payroll Review
Application Overview	Pearly for Payroll Paviaw	
Applicant	The Payroll office will finalize the retirement application package for submission to OPM.	
Ocument Uploads	You can continue to track the retirement package via your dashboard up until it is submitted to OPM.	
Checklist	Applicant Overview HR Dashboard	
Certification	•	
Next Steps		

Figure 60 The HR Checklist Cards are Complete

Please note that, the Next Steps button is not a clickable option for the HR Specialist



Applicant Overview after Certification

Click Applicant Overview to check the Status and application progress.

lame	Status	Modified On	Created On 🕹	
anaa Lathan - Retirement Application - SF-2801 (CSRS/CSRS Offset)	Ready for Payroll Review	10/3/2024 6:38 PM	10/2/2024 4:04 PM	[
rtified Summary of Service				
ame	Status	Modified On	Created On	
anaa Lathan - Certified Summary of Service - SF-2801 (CSRS/CSRS Offset)	Ready for Payroll Review	10/7/2024 2:06 PM	10/2/2024 4:04 PM	
R Checklist				
ame	Status	Modified On	Created On	

Figure 61 The Applicant Overview and Application Status Updates

Click Next

We are now back on the Retirement Application page and note the Review and Certify card is checked as complete.

Retirement Application - SF-2801 (CSRS/CSRS Offset)		🔔 Denzel Washington
Sidest a surface to continue your application.		Certified and Submitted for HRileview
HEROION		6
Hentlifen Linformation Way was provided internation and and ensures and the National Strandog Naturations,	Completed	
Federal Sector Production and regarding are put folia firms.	Completed	
Marital Information Trade side states regarding per same and per temperature	Completed	
Annulis I Locian Prozen sider state seguing per Material Annuly Enaise.	🕑 Completing	
Issuences information Yesternistic data par server insures relations,	Completed	
Other Calm Information Proven addition of Information grant grant (Inter-	Completized	
Um airté Desenfett Obléres Proise addition d'information space fragmenter Distance.	Completed	
Rents Depends and Tax Withholding Information Productive and many part levels layout these Layours and the Withholding	Completed	
Security Liviants Exercises a splaticus orientes, please splatel the fit of impand accorectation.	Completing	
Review and Cartly Review and arthly the application	Completed	60

Figure 62 The Review and Certification is Complete



HR Dashboard View after Certification

From the HR Checklist page click HR Dashboard to view the Dashboard image below

HR Dashboard

Nangentiles applicat polities using the provided ist. Open an application manage neisement application, and info desided mands.												
First Name Last Name T T Filter	Date of Birth Social Sec T	curity Number										
I≣ <u>My Active Applicants</u> -						Certified						• New Applicant Profile
Full Name	Department	Agency	Last Activity Date ↓	Pre Application Status	Retirement Application Status	<u>Summary of</u> <u>Service</u> <u>Status</u>	<u>HR Checklist</u> <u>Status</u>	<u>Payroll Checklist</u> <u>Status</u>	<u>Projected</u> <u>Retirement Date</u>	<u>Last</u> Successful Login	HR Notes	
Sanaa Lathan	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	10/8/2024 10:46 AM	Finalized	Ready For Payroll Review	Ready For Payroll Review	Ready for Payroll Review	Ready for Payrol Review	1/30/2025			
Tom Hanks	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	9/27/2024 4:39 PM	Finalized	Certified and Submitted for HR Review	In HR Review	Not Started		1/30/2025			
<u>Cicley Tyson</u>	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	9/10/2024 3:59 PM	Finalized	Certified and Submitted for HR Review	In HR Review	Not Started		12/15/2024			
Denzel Washington	INDEPENDENT AGENCY / OTHER	Office of Personnel Management	8/27/2024 12:12 PM	Draft	Not Started	Not Started	Not Started					

Figure 63 The HR Dashboard Status Updates

Form	Assignee	Version	Event Status	Comments / Remarks	Event Date / Time
HR Pre-Application	Sharnetta Hicks		Finalized	Applicant Retirement Package Created	10/2/2024 8:05 PM
Retirement Application	Sanaa Lathan		In Applicant Review		10/3/2024 1:19 PM
Retirement Application	Sharnetta Hicks		Certified and Submitted for HR Review	Initial Submission to HR	10/3/2024 1:42 PM
Retirement Application	Sharnetta Hicks		Ready for Payroll Submission	The documents have been reviewed and the application is now complete.	10/3/2024 10:39 PM
Certified Summary of Service	Sanaa Lathan		In Applicant Review		10/3/2024 10:56 PM
HR Checklist	Sharnetta Hicks		In HR Review		10/7/2024 6:06 PM
Certified Summary of Service	Sharnetta Hicks		Approved by Applicant		10/7/2024 6:06 PM

Figure 64 The Event Log is Updated



Applicant Dashboard After Certification

The Applicant Dashboard will display the same status as the last view listed above (see image on pp. 21 and 29), until Payroll takes action to review and then submit to OPM. The time stamp will automatically update.



Figure 65 The Applicant is Updated Through Out the Application Process



Quick Tips

Resolving Discrepancies

Modifying data on the Retirement Application

If there is a discrepancy, meaning if applicant modifies any data HR entered on the pre-application, please note, the application can still be approved. The discrepancy will be resolved and updated.

						Certified and Submitted	or HR Reviev
Application Overview	HR Review						
HR Review	As part of the applicant's Betl	rament Indication woo	Most MD Spacialists are required to realism as	d mint (annum all documents unloaded	ed by the applicant that have a status of "I	indar MD Daviana"	
Identifying Information	rapartor on apprease a ree	rement opportunities	and an approximation of the second	o reject j approve an oocanterna opnano		INAL IN PRIME .	
Federal Service	Discremencies						
Marital Information	Discrepancies						
Annuity Election	Discrepancy.		Pre-Application Value	Retirement	Application Value	Section	
Insurance Information	Birth Date		9/25/1975	9/25/1970		Identifying Information	
Other Claim Information							
Unmarried Dependent Children	HR Document Review						
Direct Deposit and Tax Withholding Information	Document Type	Comments	Uploaded By	Upload Status	Created On	Modified On.	
Ocument Uploads	SF 2818 - Continuation of Life		Sanaa Lathan	Uploaded	10/3/2024 9:39 AM	10/3/2024 5:15 PM	۲
Review and Certify	Compensationer						
	W-4 - Employee's Withholding Allowance Certificate		Sanaa Lathan	Uploaded	10/3/2024 9:38 AM	10/3/2024 5:03 PM	٢
	Previous HR Reviews						
	Withdrawal Requests						
	There are no records to display.						

Rejecting the Application

- Now the HR Specialist can **Reject** or **Approve** the application by clicking the desired option in the bottom right.
- The Modal box appears, and the HR Specialist can enter any necessary comments.
- If the HR Specialist decides to **Reject** the application, then specialist must select the appropriate reason from the **Rejection Category** dropdown menu and enter the **Rejected Reason**
- The HR Specialist also has the option to simply click approve and then select the OK button. (you can also **Cancel** if this action is needed)



Withdrawing and Re-opening an application

Once certified, the components of the package will be in a "ready for payroll review" status. Selecting the caret on the right side of the component will open options to withdraw and re-open.

- The HR Specialist can re-open the application, Certified Summary of Service (CSOS) or the HR checklist when the status shows as Ready for Payroll Review
 - If the HR Specialist re-opens the retirement application, the applicant will need to recertify the application.
 - If the HR specialist re-opens the CSOS, the applicant will need to re-certify the CSOS.
 - If the HR specialist re-opens the HR checklist, only the HR specialist will need to recertify. The applicant does not need to be involved in this process.
- The retirement application can be withdrawn at any time, keeping in mind the withdrawal process is essentially starting over.

Retirement Application				
Name	Status	Modified On	Created On	
Denzel Washington - Retirement Application - SF-2801 (CSRS)(CSRS Offset)	Ready for Payroll Review	11/12/2024 3:00 PM	10/22/2024 10:17 AM	View details Withdraw Application
				BE-0965

