Chapter 30: Retirements (Nature of Action 300, 301, 302, 303, 304 307 and 308)

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Subchapter 1. General Instructions

1. Coverage

- a. This chapter covers retirements. These are separations that remove an employee from your agency under circumstances that entitle the employee to an immediate annuity. An immediate annuity is one that begins to accrue no later than 1 month after the employee is separated or on the day after pay ceases and the employee meets the service and age (or disability) requirements. Included are separations where the employee has applied for a retirement annuity and is eligible to receive workers' compensation (OWCP) and plans to elect to receive OWCP in lieu of a retirement annuity). The following types of immediate retirement are included:
 - voluntary or employee initiated retirements, (including retirement when a phased retiree enters full retirement status);
 - ii. mandatory separations for age under <u>5 U.S.C. 8335</u> and <u>8425</u>;
 - iii. disability retirements; and
 - iv. retirements under a Voluntary Early Retirement Authority (VERA) that allows agencies undergoing a major reduction in force, transfer of function, or reorganization to offer early retirement to their employees.

More information on these retirements is found in <u>The CSRS and FERS</u> <u>Handbook for Personnel and Payroll Offices</u>.

b. This chapter *does not* cover involuntary separation *unless* the employee is eligible for retirement under one of the four situations listed in paragraph *a* of this section. See Chapter 31 for instructions on processing involuntary separations under which the employee may be eligible for discontinued service retirement.

- c. This chapter *does not* cover employees eligible for MRA+10 retirement who choose to postpone the annuity commencing date beyond 31 days after separation. See Chapter 31 for processing instructions.
- d. This chapter *does not* cover entry into phased employment/phased retirement. See Chapter 27 for processing instructions.

2. Instructions

- a. Compare data on the <u>SF-52</u>, Request for Personnel Action, submitted by employee or requesting office with the last action in the employee's Official Personnel Folder to be sure all items of the form are correct.
- b. If the employee is to be reemployed without a break in service after retirement with immediate civil service annuity, document the retirement and the new appointment on separate <u>SF-50s</u>. Do not process a conversion action. Follow instructions in Chapter 3 of this **Guide** to select additional remarks for the appointment and to report the appointment to the Office of Personnel Management.
- c. Use <u>Table 30-A</u> to select the nature of action and authority for the action and put them in blocks 5A-F of the <u>SF-52</u>. If the action is being taken under an authority that is unique to your department or agency, cite that authority (along with the authority code approved by the Office of Personnel Management) instead of the authority and code shown in this chapter.
- d. Use <u>Tables 30-B</u> and <u>30-C</u> to select as many remark codes and remarks for the action as are applicable and put them in Part F of the <u>SF-52</u>. Also enter in Part F any remarks/remarks codes that are required by your agency's instructions or that are necessary to explain the action.
- e. Fill in remaining blocks on <u>SF-52</u> as required by instructions in Chapter 4; follow your agency's instructions to obtain approval signature in Part C, block 2 of the <u>SF-52</u>.

- f. Prepare <u>SF-50</u>, Notification of Personnel Action, from the information on the <u>SF-52</u>. Refer to Chapter 4 to see how the <u>SF-50</u> should be completed. Follow your agency's instructions to have it signed or authenticated.
- g. On or before the date of retirement, give the employee a completed <u>SF-8</u>, Notice to Federal Employee About Unemployment Insurance, showing the full address of the Payroll Office where the individual's records are maintained.

Use the job aid, <u>Notice Requirements When an Employee</u> <u>Retires</u>, for additional notices required under specific circumstances.

h. Check <u>The Guide to Personnel Recordkeeping</u>, Chapter 3, to see which of the documents submitted with or created in connection with the action should be filed on the permanent side (right side), of the employee's Official Personnel Folder.

Note: The originals of the employee's health benefits and life insurance forms are submitted to the Office of Personnel Management with the retirement application. Make copies of these health benefits and life insurance forms and *file the copies on the permanent side (right side), of the employee's folder in chronological order.* Agencies are not authorized to keep the retirement application itself on the permanent side (right side), of the Official Personnel Folder. Therefore, if your agency keeps a copy of a retirement application until the retirement is approved, that copy may be filed temporarily on the temporary side (*left* side), of the employee's Official Personnel Folder and must be removed before the folder is sent to the National Personnel Records Center or to the next employing agency. Follow your agency's instructions to dispose of documents not filed in the folder.

- i. Follow your agency's instructions to distribute documentation of the personnel action.
- j. Follow the instructions in <u>The Guide to Personnel Recordkeeping</u>, Chapter 7, for transferring the Official Personnel Folder, and the Employee Medical Folder.

Job Aid

Notice Requirements When an Employee Retires

Instructions: Issue as many of the following notices as applicable to the retiring employee's circumstances; more than one may be necessary.

| If the Employee | Then |
|--|--|
| Is a law enforcement officer, firefighter, or air traffic controller, and has a combination of age and service at which separation is mandatory | Follow procedures in <u>The CSRS and</u> <u>FERS Handbook for Personnel and</u> <u>Payroll Offices</u> , Chapter 46. |
| Has a combination of age and service at which separation is required under a different retirement system | Follow your agency's procedures for giving notice of pending retirement. |
| Is applying for disability retirement or the agency is initiating application for employee | Follow procedures in <u>The CSRS and</u> <u>FERS Handbook for Personnel and</u> <u>Payroll Offices</u> , Chapter 60. |
| Is enrolled in a health benefits plan | Follow instructions in the <u>Federal</u> <u>Employees' Health Benefits Handbook</u> <u>for Personnel and Payroll Offices</u> . |
| Has Federal Employees Group Life Insurance (FEGLI) coverage | Follow instructions in the <u>Federal</u> <u>Employees' Group Life Insurance</u> <u>Program - A Handbook for Employees,</u> <u>Annuitants, Compensationers and</u> <u>Employing Offices</u> . |
| Previously retired under the Foreign Service Retirement System | Send two copies of <u>SF-50</u> to Office of Retirement (GTM/RET), 2401 E Street NW, Room H-620,SA-1,Washington, DC 20522. Information is also available on <u>The Retirement Network of the U.S.</u> <u>Department of State</u> . |
| Is a former Central Intelligence Agency employee who retired under the Central Intelligence Agency Retirement and Disability System (CIARDS) | Send copy of <u>SF-50</u> to Central Intelligence Agency Retirement and Disability System, P.O. Box 1925, Washington, DC 20505. |

Subchapter 2. Preparation of Remark Entries on the Standard Form 50 (SF-50)

1. Use of Remarks

<u>Tables 30-B</u> and <u>30-C</u> list remarks that are required on the <u>SF-50</u>, Notification of Personnel Action, for a retirement action. These remarks are used to determine retirement and other benefits to which the employee may be entitled. In addition, if a retiree applies for unemployment compensation, the State employment security agency will use the nature of action and those <u>SF-50</u> remarks to adjudicate the claim. Inadequate or incomplete information about the cause of separation or failure to show a job offer and the employee's reason, if any, for refusing it, may result in delay or denial of a benefit to which the employee is entitled. It may also result in an employee receiving a benefit to which the employee is not entitled.

2. General Content of Remarks

The remarks should tell:

- why an employee retires, and
- whether the employee was offered other work before the separation and, if so, the reasons for refusing it.

Remarks should be brief and state the facts in enough detail to enable anyone who reviews the SF-50 to determine whether the separation was work-connected and with or without just cause.

3. Employee's Reason(s)

- a. **Disability Retirements**. No employee reason is required on a 301/Retirement-Disability.
- b. Other Retirements. If the employee mentions ill health or disability as the reason, summarize the reason in such a way that the employee will not later find it to be embarrassing. (For example, instead of quoting "Doctor says pressure of daily personal and telephone contacts with the public is aggravating health problems and may cause a nervous breakdown," just

state on the <u>SF-50</u> "Doctor recommends a job with fewer personal and telephone contacts with the public." The latter remark is brief, factual, and less likely to be a source of embarrassment in the future.) When the employee's reason does not mention ill health or disability, just quote the reason on the <u>SF-50</u>. If the employee gives no reason for retiring, use Remark S69.

4. Agency's Finding

Unemployment compensation and future employment decisions are made on the basis of both the employee's reason and the agency's findings, so agency findings should be factual and non-judgmental. No findings are required on a 301/Disability Retirement.

a. Employee has no appeal rights. When the employee is serving on an appointment that does not afford appeal rights, no agency finding or reasons for or explanation of the retirement may be placed on the <u>SF-52</u>, <u>SF-50</u>, in the Employee's Official Personnel Folder or Employee Performance Folder, or in the agency's service record system. For more information see <u>Employee Rights and Appeals</u>.

b. Employee has appeal rights.

- Except as noted in paragraph (3), when the agency knows of a different reason for employee's retirement, both the employee's reason and the one known to the agency ("agency finding") must be shown on the <u>SF-50</u>. The "agency finding" must be brief and factual and avoid personal comments and judgments about the employee, opinions, argumentative language, and unsupported conclusions.
- When the retirement application is submitted *after* the employee has received *written* notice of a proposed or pending disciplinary or adverse action, the agency must list that action as its finding. Use the remarks in <u>Tables 30-B</u> and <u>30-C</u>.
- iii. Unless the employee was notified in writing BEFORE the retirement was submitted, you may NOT place on the SF-

52/50, in the employee's Official Personnel Folder or Employee Performance Folder, or in the agency's service record system, any information:

- regarding a proposed or pending disciplinary or adverse action;
- regarding charges or allegations of misconduct by, or impropriety on the part of, the employee; or
- referring to such charges or allegations.
- iv. When the agency believes the employee is retiring because of ill health or a medical problem, the "agency finding" should simply list or describe the duties the employee can no longer perform and *not* discuss the employee's health.

Tables

Table 30-A. Documenting Retirements

| Rule | If Employee is Covered by | And Reason for Action is | Then NOAC is | NOA is | Authority Code is | And Authority is | Notes | Remarks |
|------|------------------------------------|--|-----------------|---------------------------|----------------------|--|---|---------------------------|
| 1 | The Civil | Mandatory retirement based on age | 300 | Retirement- | SWM | <u>5 U.S.C. 8335</u> | 1. See Chapter 44 of <u>The CSRS</u> | Jump to |
| | <u>Service</u> | and length of service. (See Note 4) | | Mandatory | | | and FERS Handbook for | listing of |
| 2 | <u>Retirement</u> System (CSRS) | Disability retirement (See Note 4) | 301 | Retirement- Disability | SUM | <u>5 U.S.C. 8337</u> | Personnel and Payroll Offices for the meaning of involuntary | <u>Remarks</u> (Use as |
| 3 | <u>System (CSRS)</u> | Retirement for health reasons when | 302 | Retirement- | SRM | Reg. 831.501 | separation. | many |
| | | employee does not apply for disability | | Voluntary | | ····· | 2. In addition to any other | remarks as |
| | | retirement (See Note 4) | | | | | authorities required by this | applicable) |
| 4 | | Voluntary retirement in lieu of | 304 | Retirement- | SQM | <u>5 U.S.C. 8336</u> | table, you may cite LAC2 AZM | |
| | | involuntary separation (See Notes 1 | | ILIA | | | as appropriate. See Chapter 43 of The CSRS and FERS | |
| 5 | | and 4) Voluntary retirement for other than | 302 | Retirement- | - | | Handbook for Personnel and | |
| 5 | | health reasons or pending involuntary | 302 | Voluntary | | | Payroll Offices for description | |
| | | separation (See Note 4) | | voluntary | | | of early voluntary retirement. | |
| 6 | | Early voluntary retirement when | 303 | Retirement- | V3P and | 5 U.S.C. 8336(d)(2) and | The OPM Office Authority | |
| | | agency is undergoing a major | | Special | LAC2 AZM, | OPM Office, Authority | Number will be given in the | |
| | | reduction in force, transfer of function, or reorganization (See Notes 2 and 4) | | Option | RZM, >or | Number, and Date | letter from the U.S. Office of Personnel Management that | |
| | | | | | ADR< as | LAC2 RZM when actions are | authorizes the retirement LAC2 | |
| | | | | | appropriate | processed in support of | AZM. | |
| | | | | | | Deferred Resignation | 3. Also use this rule when | |
| | | | | | | effective 1/28/2025 | employee in phased retirement | |
| | | | | | | | will be entering regular | |
| | | | | | | >LAC2 ADR when | retirement upon the expiration of a phased retirement time | |
| | | | | | | processing actions for agency specific deferred | limit agreement set by the | |
| | | | | | | resignation programs. < | agency. | |
| 7 | | Early voluntary retirement under an | - | | ZLM | (Enter Law, Executive | 4. Use Secondary LAC2 RZM | |
| | | authority other than <u>5 U.S.C. 8336(d)</u> . | | | | Order or Regulation that | when actions are processed in | |
| | | (See Note 4) | | | | authorizes the retirement) | support of <u>Deferred</u> Resignation effective | |
| 8 | | Employee enters full retirement status | 307 | Full | SAF | <u>5 U.S.C. 8336a(e)</u> | 1/28/2025. >Use Secondary | |
| | | upon termination of phased | | Retirement Status- | | | LAC2 ADR when processing | |
| | | retirement status (See Notes 3 and 4) | | Voluntary | | | actions for agency specific | |
| | | | 200 | , | 4 | | deferred resignation | |
| 9 | | Employee enters full retirement status | 308 | Full Retirement | | | programs.< | |
| | | in lieu of involuntary separation ("ILIS") (See Note 4) | | Status-ILIS | | | | |
| | 1 | | | Status-ILIS | | | l | |

9

Table 30-A. Documenting Retirements, Continued 10

| | 10 | | | | | | | |
|------|------------------------------------|---|-----------------|-------------|----------------------|---------------------------------|--|---------------------------|
| Rule | If Employee is Covered by | And Reason for Action is | Then NOAC is | NOA is | Authority Code is | And Authority is | Notes | Remarks |
| 10 | The Federal | Mandatory retirement based on age | 300 | Retirement- | USM | (enter: <u>5 U.S.C. Chapter</u> | 1. See Chapter 44 of <u>The</u> | <u>Jump to</u> |
| | Employees Detinement | and length of service (See Note 4) | | Mandatory | _ | <u>84</u>) | CSRS and FERS Handbook | listing of |
| 11 | <u>Retirement</u> System (FERS) | Disability retirement (See Note 4) | 301 | Retirement- | | | for Personnel and Payroll | Remarks |
| 1.5 | | | | Disability | - | | Offices for the meaning of | <u>(Use as</u> |
| 12 | | Voluntary retirement in lieu of | 304 | Retirement- | | | involuntary separation.2. See Chapter 43 of The | <u>many</u> remarks as |
| | | involuntary separation (See Notes 1 | | ILIA | | | <u>CSRS and FERS Handbook</u> | applicable) |
| 13 | | and 4) Voluntary retirement not described in | 302 | Retirement- | - | | for Personnel and Payroll | <u>applicable j</u> |
| 15 | | Rule 10 (See Note 4) | 302 | Voluntary | | | <u>Offices</u> for description of | |
| 14 | | Early voluntary retirement when | 303 | Retirement- | USM and | (enter: 5 U.S.C. Chapter | early voluntary retirement. | |
| 14 | | agency is undergoing a major | 505 | Special | LAC2 AZM, | 84) and OPM Office, | The OPM Office Authority | |
| | | reduction in force, transfer of function, | | Option | RZM, >or | Authority Number and Date | Number will be given in the | |
| | | or reorganization (See Note 2 and 4) | | option | ADR< as | radioney number and bace | letter from the U.S. Office of | |
| | | | | | appropriate. | LAC2 RZM when actions are | Personnel Management that | |
| | | | | | | processed in support of | authorizes the retirement. | |
| | | | | | | Deferred Resignation | 3. Also use this rule when | |
| | | | | | | effective 1/28/2025 | employee in phased | |
| | | | | | | | retirement will be entering | |
| | | | | | | >LAC2 ADR when | regular retirement upon the | |
| | | | | | | processing actions for | expiration of a phased | |
| | | | | | | agency specific deferred | retirement time limit | |
| | | | | | | resignation programs. < | agreement set by the agency. | |
| 15 | | Employee enters full retirement status | 307 | Full | SAG | <u>5 U.S.C. 8412a(e)</u> | 4. Use Secondary LAC2 RZM | |
| | | upon termination of phased | | Retirement | | | when actions are processed | |
| | | retirement status (See Note 3 and 4) | | Status- | | | in support of <u>Deferred</u> | |
| 10 | | | 200 | Voluntary | - | | Resignation effective | |
| 16 | | Employee enters full retirement status | 308 | Full | | | 1/28/2025. >Use Secondary | |
| | | in lieu of involuntary separation | | Retirement | | | LAC2 ADR when processing | |
| | | ("ILIS") (See Note 4) | | Status-ILIS | | | actions for agency specific | |
| | | | | | | | deferred resignation | |
| 17 | A retirement | Mandatory retirement based on age | 300 | Retirement- | USM | (cite authority for | programs. < | |
| | system other | and length of service (See Note 4) | | Mandatory | | retirement) | | |
| 18 | than the Civil | Disability retirement (See Note 4) | 301 | Retirement- | 4 | | | |
| 10 | Service | | 501 | Disability | | | | |
| 19 | Retirement | Voluntary retirement based on age | 302 | Retirement- | 4 | | | |
| 15 | System or | and length of service (See Note 4) | 502 | Voluntary | | | | |
| | Federal | | | USIGINALLY | | | | |
| | Employees Retirement | | | | | | | |
| | System | | | | | | | |
| | System | | | | | | | |

Table 30-B. Remarks Required for Retirement Actions

| Rule | If | And | And | Then Use Remark(s) (See Note 1) | Notes | Remarks |
|------|--|--|---|------------------------------------|--|---|
| 1 | Employee did not give a reason for retiring | Agency has no other information | Action is a 302/Retirement- Voluntary | R20 and M67 | 1. Use as many remarks as are applicable; see <u>Table 30-C</u> to translate remarks codes into the actual remarks to be shown | <u>Jump to</u> listing of Remarks |
| 2 | | available | Action is not a 302/Retirement Voluntary | S69, S23 and M67 | on the <u>SF-50</u>. 2. Do not enter on <u>SF-50</u> information unfavorable to the employee unless | <u>(Use as</u> many remarks as |
| 3 | | Agency does have information regarding the reason for retirement | | S69, S25 and M67 (See Note 2) | the employee was notified in writing of agency proposal or decision to take adverse action based on that information. | applicable) |
| 4 | Employee gave a reason for retiring | | | R21 and M67 | | |
| 5 | Agency knows of specific factual reasons for retirement which differ from those given by employee (See Note 2) | | | S25 | | |
| 6 | Employee's retirement is work related and employee was advised of opportunity to file a | Employee filed a grievance | | M26 | | |
| 7 | grievance | Employee did not file a grievance | | M27 | | |
| 8 | Employee is retiring after receiving a reduction in force notice | | | S51 | | |

Table 30-B. Remarks Required for Retirement Actions, Continued 12

| | 12 | | | | | | | | |
|------|--|-------------------|---------------------------------|--------------------|--------------------------------------|-------------------|--|--|--|
| Rule | If | And | And | Then Use Remark(s) | Notes | Remarks | | | |
| | | | | (See Note 1) | | | | | |
| 9 | Employee is retiring after | | | M58 and S81 | | ump to | | | |
| | receiving written notice of | | | | | <u>sting of</u> | | | |
| | decision to move out of | | | | | <u>lemarks</u> | | | |
| | the Senior Executive | | | | | <u>Use as</u> | | | |
| | Service for less than fully | | | | | <u>nany</u> | | | |
| | successful performance or | | | | | emarks as | | | |
| | because of employee's | | | | | <u>pplicable)</u> | | | |
| | failure to be recertified in | | | | the employee was notified in writing | | | | |
| | the Senior Executive | | | | of agency proposal or decision to | | | | |
| | Service | | | | take adverse action based on that | | | | |
| | | | | | information. | | | | |
| 10 | Employee retired because | Employee was |] | S58 | | | | | |
| | of disability, reduction in | not offered | | | | | | | |
| | force, or other | another job | | | | | | | |
| 11 | circumstance which | Employee was | Employee declined without a | S54 and S56 | - | | | | |
| | makes retirement | offered another | reason | | | | | | |
| | involuntary | job | | | | | | | |
| | | 5 | | | | | | | |
| 12 | | | Employee gave a reason for | S54 and R55 | | | | | |
| | | | declining | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| 13 | Employee has been | Action is not | Decision is a separation action | S34 | | | | | |
| | notified of agency | described in Rule | | | | | | | |
| | decision to take adverse or performance-based | 9 | | | | | | | |
| 14 | action (See Note 2) | | Decision is to demote | S35 | | | | | |
| | action (See Note 2) | | | | | | | | |
| 15 | | | Decision is to suspend | S36 | - | | | | |
| 10 | | | | | | | | | |
| 10 | Frankrige has been | 4 | Drenegal is a computing action | | 4 | | | | |
| 16 | Employee has been notified of proposed | | Proposal is a separation action | S37 | | | | | |
| | adverse or performance- | | | | | | | | |
| | based action (See Note 2) | | | | 4 | | | | |
| 17 | | | Proposal is to demote | S38 | | | | | |
| | | | | | | | | | |
| 10 | | | Drenegal is to suppord | | 4 | | | | |
| 18 | | | Proposal is to suspend | S39 | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Table 30-B. Remarks Required for Retirement Actions, Continued 13

| | | | 13 | | | |
|------|--|--|--|------------------------------------|---|---|
| Rule | If | And | And | Then Use Remark(s) (See Note 1) | Notes | Remarks |
| 19 | Employee will receive a lump sum payment | The personnel office knows the exact number of | Employee does not have retained rate | N26 | Use as many remarks as are applicable; see <u>Table 30-C</u> to translate remarks codes into the | <u>Jump to</u> listing of Remarks |
| 20 | | hours of unused annual leave | Employee has retained rate which <i>will not</i> terminate during period of lump sum payment | | actual remarks to be shown on the <u>SF-50</u>. 3. See list of offenses barring annuity payments in <u>5 U.S.C. chapter 83</u>, | <u>(Use as</u> <u>many</u> remarks as |
| 21 | | | Employee has retained rate which will terminate during period of lump sum payment | P18 and N26 | 4. Place this remark only on payroll copy of <u>SF-50</u>. 6. Follow instructions in Figure 6-4 to | <u>are</u> applicable) |
| 22 | | The exact number of hours of unused annual | Employee does not have retained rate | N27 | convert hours worked to months and days of service credit. <u>SF-50</u> remarks are used as the basis for | |
| 23 | | leave is not yet available | Employee has retained rate which <i>will not</i> terminate during period of lump sum payment | | future service computation date calculations. Therefore, if your agency uses additional remarks to explain the time the employee | |
| 24 | | | Employee has retained rate which <i>will</i> terminate during period of lump sum payment | P18 and N27 | worked, those agency remarks must show the intermittent service in terms of the <i>credit</i> to which the employee is entitled, rather than in | |
| 25 | Employee has been in nonpay status during calendar year | | Total nonpay status (during current calendar year) exceeds 6 months | G31 | terms of elapsed calendar time. Example: if employee worked on ten different days for a total of 35 hours, show in your agency remarks that the "35 hours equal 6 days of | |
| 26 | Retirement is from intermittent employment | | Employment has been with compensation | G30 (See Note 6) | service credit." When information is not immediately available, prepare the Standard Form 50 without it. | |
| 27 | | | Employment has been without compensation | G29 (See Note 6) | Add it later by correcting the <u>SF-50</u> . | |
| 28 | Employee completed requirements for within- grade increase on or before retirement date | Within-grade increase was not affected | | P16 | | |
| 29 | Employee may be barred from annuity under <u>5</u> <u>U.S.C. chapter 83</u> , <u>subchapter II.</u> (See Note 3) | | | M 61 (See Note 4) | | |

Table 30-B. Remarks Required for Retirement Actions, Continued 14

| | 14 | | | | | | |
|------|--|---|-----|------------------------------------|----|--|--|
| Rule | If | And | And | Then Use Remark(s) (See Note 1) | | Notes | Remarks |
| 30 | Employee may be eligible for compensation under <u>5 U.S.C., chapter 81,</u> for a work injury | | | N10 | 1. | Use as many remarks as applicable; see <u>Table 30-C</u> to translate remarks codes into the actual remarks to be shown on the <u>SF-50</u> . | <u>Jump to</u> <u>listing of</u> <u>Remarks</u> (Use as |
| 31 | Employee will not be eligible to continue Federal Employees Group Life Insurance coverage as an annuitant | | | B46 | 5. | See <u>The Federal Employees Health</u> <u>Benefits Handbook for Personnel and</u> <u>Payroll Offices</u> for information about determining whether an involuntary separation is due to gross misconduct. | <u>many</u> <u>remarks as</u> applicable) |
| 32 | Employee will not be eligible to continue health benefits coverage as an annuitant | Retirement is involuntary due to gross misconduct (See Note 5) | | B47 | | | |
| 33 | | Retirement is not described in Rule 33 | | B53 | | | |
| 34 | Action is a 301/Retirement-Disability | Employee has elected to receive workers' compensation in lieu of a retirement annuity | | R22 | | | |
| 35 | Pay in position from which employee is retiring has been set at a special rate authorized under <u>5 U.S.C. 5305</u> | | | P05 | | | |
| 36 | Employee was entitled to Sole Survivorship veteran's preference | Block 23 of the <u>SF-50</u> reflects "7" | | E59 | | | |

Table 30-B. Remarks Required for Retirement Actions, Continued 15

| | 15 | | | | | | | |
|------|--|-----|-----|------------------------------------|----------|--------------------------------------|----------------|--|
| Rule | If | And | And | Then Use Remark(s) (See Note 1) | | Notes | Remarks | |
| 37 | Employee's total salary | | | P82 | 1. | Use as many remarks as applicable; | Jump to | |
| | includes payment for | | | | | see Table 30-C to translate remarks | listing of | |
| | administratively | | | | | codes into the actual remarks to be | <u>Remarks</u> | |
| | uncontrollable overtime | | | | | shown on the <u>SF-50</u> . | <u>(Use as</u> | |
| | (See Note 7) | | | | 7. | Follow instructions regarding | <u>many</u> | |
| 38 | Employee's total salary | | | P80 | | Premium pay under <u>5 U.S.C.</u> | remarks as | |
| | includes a supervisory | | | | | 5545(c)(2) for administratively | applicable) | |
| | differential | | | | | uncontrollable overtime (AUO) work, | | |
| 39 | Reserved | | | | | which is included in the | | |
| 40 | Employee's total salary | | | P98 | | computations for retirement and life | | |
| | includes availability pay | | | | | insurance deductions and benefits | | |
| 41 | Employee has elected to | | | B63 | | only if the employee meets the | | |
| | retain coverage under a | | | | | definition of "law enforcement | | |
| | retirement system for | | | | | officer" for CSRS or FERS purposes. | | |
| | Non-appropriated Fund | | | | | | | |
| | Instrumentality | | | | | | | |
| | employees | | | | | | | |
| 42 | Employee is a senior | | | P83 | | | | |
| | political appointee whose | | | | | | | |
| | position is subject to the | | | | | | | |
| | provisions of the pay | | | | | | | |
| | freeze for certain senior | | | | | | | |
| | political officials | | | | | | | |
| 43 | Employee is entitled to a | | | M18 | | | | |
| | composite retirement | | | | | | | |
| | annuity Information & | | | | | | | |
| | Instructions for | | | | | | | |
| | Completing an Application | | | | | | | |
| | for Full Retirement Status | | | | | | | |
| | (from Phased Retirement) | | | | | | | |
| | under the Federal | | | | | | | |
| | Employees Retirement | | | | | | | |
| | System (FERS) | | | DEC | | | | |
| 44 | If employee retirement is due to <u>Deferred</u> | | | R56 | | | | |
| | Resignation effective | | | | | | | |
| | 1/28/2025 | | | | | | | |
| >45< | >If employee retirement | | | >R23< | - | | | |
| 2455 | is due to an agency | | | -1235 | | | | |
| | specific deferred | | | | | | | |
| | resignation program.< | | | | | | | |
| | | | | 1 | <u> </u> | | | |

Table 30-C. Remarks and Codes

Return to Tables <u>30-A</u>, <u>30-B</u>

| Remark Code | The Remark is |
|----------------|--|
| B46 | SF 2819 was provided. Life insurance coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract). |
| B47 | Health benefits coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract). |
| B53 | Health benefits coverage is extended for 31 days during which you are eligible to convert to an individual policy (nongroup contract). You are also eligible for temporary continuation of your FEHBP coverage for up to 18 months. |
| B63 | Elected to retain coverage under a retirement system for NAF employees. |
| E59 | When "7" is reflected in block 23 above, employee is entitled to No Points/Sole Survivorship Preference. |
| G29 | Intermittent employment totaled (number) hours in work status from (date) to (date). |
| G30 | Intermittent employment totaled (number) hours in pay status from (date) to (date). |
| G31 | Nonpay time not previously recorded in calendar year (year) totaled (number) hours. |
| M18 | Employee is entitled to a composite retirement annuity. |
| M26 | Employee was advised of opportunity to file grievance and elected to do so. |
| M27 | Employee was advised of opportunity to file grievance and elected not to do so. |
| M58 | No SES reinstatement rights. |
| M61 | Possible 5 U.S.C. chapter 83, subchapter II, case. |
| M67 | Forwarding address: |
| N10 | To (or expected to) be paid under 5 U.S.C. chapter 81. |
| N26 | Lump-sum payment to cover (number) hours ending (date and hour). |
| N27 | Lump-sum payment to be made for any unused annual leave. |
| P05 | Special rate under 5 U.S.C. 5305. |
| P16 | Met all requirements for WGI to (grade and step) on (date); due on (date). |
| P18 | Retained rate period expires (date). Effective (date) pay will be (amount). |
| P80 | Salary in block 12 includes supervisory differential of \$ |
| P82 | Salary in block 12 includes AUO of \$ |
| P83 | The employee occupies a position subject to the pay freeze for certain senior political officials. Notwithstanding otherwise applicable pay statutes and regulations, pay may be set and adjusted only in accordance with applicable provisions of the pay freeze statute. |
| P98 | Salary in block 12 includes availability pay of \$ |
| R20 | Reason for retirement: to obtain retirement benefits. |
| R21 | Reason for retirement: |
| R22 | Elected to receive workers' compensation in lieu of a retirement annuity. |
| >R23< | >Agency Deferred Resignation.< |
| R55 | Refused job offer because: (reasons given by the employee). |
| R56 | *** Deferred Resignation Program. |
| S23 | Agency Finding: No other information available. |
| S25 | Agency Finding: (State the specific, factual reason known to the agency as to why the employee retired). |
| S34 | Agency Finding: Retired after receiving written notice on (date) of decision to separate for (reasons). |
| S35 | Agency Finding: Retired after receiving written notice on (date) of decision to demote for (reasons). |

Table 30-C. Remarks and Codes, Continued 17

| Remark Code | The Remark is |
|----------------|--|
| S36 | Agency Finding: Retired after receiving written notice on (date) of decision to suspend for (reasons). |
| S37 | Agency Finding: Retired after receiving written notice on (date) of proposal to separate for (reasons). |
| S38 | Agency Finding: Retired after receiving written notice on (date) of proposal to demote for (reasons). |
| S39 | Agency Finding: Retired after receiving written notice on (date) of proposal to suspend for (reasons). |
| S51 | RIF Notice dated: (date). |
| S54 | Offered job(s) of (Position title, grade, salary, and geographical location). |
| S56 | No reason given by employee for refusing job offer. |
| S58 | No other work available. |
| S69 | Employee gave no reason for retiring. |
| S81 | Agency Finding: Retired after receiving written notice on (date) of decision to remove from the SES for (reasons). |