

Template for Executive Branch Agency Compensation Policies under Schedule Policy/Career

Template General Instructions

1. The purpose of this document is to provide federal agencies with a template that they may quickly adapt to their internal federal employee compensation policies to align with OPM's final regulations on Schedule Policy/Career. Specifically, OPM modified parts 537 and 575 of title 5, Code of Federal Regulations, pertaining to student loan repayment benefits and recruitment, relocation, and retention incentives, respectively. The adapted provisions of this template may be added to an agency's existing student loan repayment plan under 5 CFR 537.103, recruitment incentive plan under 5 CFR 575.107, relocation incentive plan under 5 CFR 575.207, and retention incentive plan under 5 CFR 575.307. Agencies that do not have an existing policy or plan for these incentive authorities are not required to adapt their internal compensation policies to be consistent with this template at this time. Any new incentive policies established by such agencies should reflect the guidance in this template regarding Schedule Policy/Career employees in addition to the above-cited regulatory requirements. While OPM did not amend the awards regulations at 5 CFR part 451 for employees in Schedule Policy/Career, this template provides language that may be incorporated into agency award policies for consistency with the Administration's policies for such employees.
2. The template is presenting policy for an entire Executive agency, since the regulations affected by this rule define "agency" as an Executive agency in 5 U.S.C. 105. Executive agencies may delegate authority consistent with law, regulations, and Administration policies in implementing these changes.
3. When fulfilling any collective bargaining obligations, agencies should carefully consider whether a union proposal is negotiable.
4. In the template, text boxes are used to show template instructions or notes that would not be part of the policy document issued by the agency. Those instructions and notes are intended to assist agencies as they use the template to create an agency policy document.

5. The template does not attempt to identify all possible issues related to agency compensation policies. Each agency may add additional agency-specific language as needed based on their mission needs, consistent with applicable laws, regulations, and Administration policies.

Template Policy on Compensation Policies under Schedule Policy/Career

[Instructions: This document sets forth changes to agency policies and plans regarding—

- student loan repayments (5 U.S.C. 5379 and 5 CFR part 537),
- recruitment incentives (5 U.S.C. 5753 and 5 CFR part 575, subpart A),
- relocation incentives (5 U.S.C. 5753 and 5 CFR part 575, subpart B),
- retention incentives (5 U.S.C. 5754 and 5 CFR part 575, subpart C), and
- awards (5 U.S.C. chapter 45 and 5 CFR part 451 and similar awards authorities).

This template policy applies to employees appointed or moved to positions in Schedule Policy/Career. The policy provisions contained in this template are required to ensure compliance with law, OPM's regulation concerning the implementation of Schedule Policy/Career, and Executive Orders 13957 and 14171. Agencies may adapt this template to meet their mission needs, consistent with applicable laws, regulations, and Administration policies.]

A. Student Loan Repayments for Schedule Policy/Career Employees

1. [AGENCY NAME] may continue to provide student loan repayment benefits under the terms of an existing applicable service agreement to employees in positions moved to Schedule Policy/Career unless eligibility is lost under 5 C.F.R. § 537.108.
2. [AGENCY NAME] may not approve a new student loan repayment benefit authorization nor establish a new service agreement for an employee occupying a position that is excepted from the competitive service because of its confidential, policy-determining, policy-making, or policy-advocating character, including an employee appointed or moved to Schedule Policy/Career.

B. Recruitment, Relocation, and Retention Incentives for Schedule Policy/Career Employees

(Note: Agencies may have separate policies/plans for each of the recruitment, relocation, and retention incentive authorities. Each plan may be updated by adapting the Schedule Policy/Career language below that is appropriate to the incentive authority.)

1. [AGENCY NAME] may continue to pay employees in Schedule Policy/Career any outstanding recruitment, relocation, or retention incentives under the terms of an applicable service agreement established prior to the employee's position moving into Schedule Policy/Career. Such employees are required to fulfill their agreed-upon service period under the terms of an applicable service agreement.
2. [AUTHORIZED AGENCY OFFICIAL] may terminate a recruitment or relocation incentive service agreement for an employee whose position is moved into Schedule Policy/Career consistent with OPM regulations at 5 CFR 575.111(a) or 575.211(a).
3. [AGENCY NAME] may not approve new recruitment, relocation, or retention incentive authorizations or service agreements for employees appointed or moved into Schedule Policy/Career.
4. [AGENCY NAME] may continue to pay retention incentives without a service agreement to employees whose positions are moved into Schedule Policy/Career , provided that the [AUTHORIZED AGENCY OFFICIAL] determines that the payment otherwise continues to be warranted in consideration of the factors set forth in 5 C.F.R. § 575.311(f).

C. Awards for Schedule Policy/Career Employees

1. [AGENCY NAME] may continue to pay performance-based, special act, and other awards established under 5 U.S.C. chapter 45 (or similar awards authority) to the extent permitted under Administration policies to employees appointed or moved to Schedule Policy/Career.
2. [AGENCY NAME] employees serving in Senior Level or Scientific and Professional (SL/ST) positions who are appointed or moved to Schedule Policy/Career may be ineligible for Presidential Rank Awards due to their confidential or policy-determining character.