Subject: Reporting Requirements for the Federal Employees Retirement System (FERS) Open Season

In Benefits Administration Letter (BAL) 98-109, we said that we would publish the requirements for agencies to report on the implementation and outcome of the FERS open season in a separate BAL. The attachment to this letter provides those reporting requirements. In keeping with our goal to make the administration of the FERS open season as efficient as possible, the Government-wide reporting requirements are minimal and focus on outcomes. We have also included five optional questions, including several about the products and services we provided to support the open season. We hope you will respond to these items because the information requested will help us assess the effectiveness of our efforts.

We ask that all reports on the open season be consolidated at the Department or Independent Agency level and submitted to the Associate Director for Retirement and Insurance by February 28, 1999. The mailing address is:

U.S. Office of Personnel Management
Agency Services Division
P.O. Box 57
Washington, DC 20044

Reports also may be faxed to (202) 606-1108 or emailed to asd@opm.gov.

We have received a number of requests for current transfer information. We are contacting benefits officers from the large agency group by phone to ask for overall transfer rates as of the end of the last pay period ending in FY 98.
Correction on Sick Leave Recording:

In BAL 98-109, the section on “Processing the Transfer Personnel Actions,” among other things, required that the employee’s sick leave balance as of the day before the effective date of transfer be entered in the remarks section of the SF-50 that documents the transfer to FERS. The BAL stated that the sick leave balance should be entered in years and months. This is incorrect. As provided in standing instructions in Chapter 81 of the CSRS and FERS Handbook for Personnel and Payroll Offices, the sick leave balance should be entered in hours, e.g., “804 hours of sick leave as of July 4, 1998.” We apologize for the confusion this may have created.

Agency Services Division
Retirement and Insurance Service

Attachment
Attachment to BAL 98-113

Agency Reports on Results of FERS Open Season

Please respond to items 1-6. Responses to items 7-12 are optional. However, your responses to these items will be helpful to us.

1. If you do not report to the Central Personnel Data File, complete the following:

<table>
<thead>
<tr>
<th>Retirement Category</th>
<th>Number Eligible to Elect FERS</th>
<th>Number Who Elected FERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular formula</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Law enforcement/firefighter</td>
<td></td>
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<tr>
<td>Air traffic controller</td>
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<tr>
<td>Congressional employee</td>
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<tr>
<td>CSRS Offset-- Regular formula</td>
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<tr>
<td>CSRS Offset-- Law enforcement/firefighter</td>
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<td>CSRS Offset-- Congressional employee</td>
<td></td>
<td></td>
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<tr>
<td>Other</td>
<td></td>
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</tbody>
</table>

2. Were employees notified of the open season and of the availability of the Transfer Handbook, the Transfer Model (or similar product), and the availability of assistance by June 15, 1998?

☐ Yes    ☐ No. They were notified by _________________.

3. How did you make the Transfer Handbook available to employees? (Check all that apply.)

☐ Individual paper copies    ☐ LAN    ☐ Internet    ☐ Other (Please describe)
4. How did you make the FERS Transfer Model available to employees? (Check all that apply.)

☐ Intranet  ☐ Internet  ☐ Individual requests for estimates  ☐ Other (Please describe)

5. Did you use the sample employee letter in Benefits Administration Letter 98-110 (or a similar letter) to make employees more aware of the interrelationship between Social Security and civil service retirement benefits?

☐ Yes  ☐ No

Questions 6-11 are optional.

6. Describe any other significant actions your agency took to disseminate information on the open season to your eligible employees, such as briefings, employee letters, email, Internet, LAN's, WAN's, etc.

7. Did you use contractor assistance to augment your own resources to do briefings, counseling, or projections?

※ Briefings  ☐ Yes  ☐ No

※ Counseling  ☐ Yes  ☐ No

※ Projections  ☐ Yes  ☐ No

8. Were the satellite broadcasts (or tapes of the broadcasts) that we presented a useful means of communicating information to staff who were responsible for handling the open season and to employees?

☐ Yes  ☐ No

9. Rate, on a scale of 1 (least) to 10 (most), the utility to your agency of the

※ FERS Transfer Handbook

※ FERS Transfer Model

※ FERS Election Opportunities web site

※ Satellite broadcasts and/or tapes of the broadcasts
10. Is there anything we did not do that really would have helped your agency and that should be considered in any similar future activity?

11. For the ongoing FERS election opportunities that returning employees have, is there any additional product that OPM should sponsor that would significantly help you carry out your responsibilities?

Agency Name

Name and Title of Person Submitting Report

Date