



**Retirement and Insurance Service
Benefits Administration Letter**

Number: 01- 108

Date: June 19, 2001

Subject: Expanded procedures to expedite payments to spouses of Federal employees who have died.

Purpose: Additional information is needed to begin interim monthly benefits to eligible surviving spouses of Federal employees who worked under the Federal Employees Retirement System (FERS). This provides a revised form to collect the additional information.

Background: *Benefits Administration Letter* 00-105 dated May 10, 2000, provided new procedures to expedite payments to spouses of Federal employees who have died. This initiative was a result of a pilot project with the Department of Defense showing that by immediately sharing information between the agency and OPM and initiating benefits before we receive the hard-copy documentation, we can begin payments in days rather than weeks. For example, we authorized CSRS interim payments in an average of 12 days rather than the 54 days under normal procedures.

We have now expanded this effort to provide expedited interim payments to surviving spouses of employees covered under FERS.

**Procedures for
Agencies:**

After the death of a FERS employee either send the attached FERS Basic Death-In-Service Quick Pay information form via fax at (724) 794-1112, or enter the information online at our web site at <http://www.opm.gov/retire> under the "Contacting Us" tab, by selecting "Report the death of an employee" from the menu and following the steps provided.

When providing the total creditable civilian service, do not include any non-deduction or refunded service that would not be creditable until a

deposit is paid under the Federal Employees Retirement System. A detailed explanation of creditable service may be found in Chapter 70, Section B2.1-1, of the *CSRS and FERS Handbook for Personnel and Payroll Offices*.

Provide the surviving spouse with a SF 3104 [*January 1997 or May 1998 version; all others are unusable*], Application for Death Benefits, and SF 3104B [*December 1995 or May 1998 version; all others are unusable*], Documentation and Elections in Support of Application for Death Benefits when Deceased was an Employee at the Time of Death.

If the employee was enrolled in the **Federal Employees' Group Life Insurance Program**, provide survivors/designated beneficiaries with the FE-6, Claim for Death Benefits, and tell them to submit the form, as well as the certified death certificate, directly to the **Office of Federal Employees' Group Life Insurance (OFEGLI) at Post Office Box 2627, Jersey City, New Jersey 07303-2627**. (The FE-6 currently instructs the survivor to return the form to the agency, however, we plan to revise the FE-6 once agency participation in the expedited payment process becomes widespread).

You still need to do your part and certify and send the SF 2821, Agency Certification of Insurance Status, to OFEGLI at the above address, along with designations of beneficiary, applicable court orders, assignment forms, and all other life insurance documents you normally send OFEGLI. We hope that OFEGLI's earlier receipt of survivors' claim forms and the certified death certificate will expedite payment of FEGLI benefits. But OFEGLI cannot make any payments until it receives the certification and other life insurance documents from you. Please send them as soon as possible.

Also, continue to provide assistance with the necessary paperwork to the surviving spouse, who must still complete the appropriate Application for Death Benefits and attach any other forms and/or evidence as the application or circumstances require. If the survivor is able to complete the application while at the agency, forward it to us with your records.

If the survivor is unable to complete the application, do not delay in sending your records to us. Tell the survivor to complete the application and send it directly to us at:

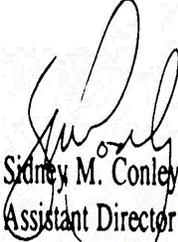
Office of Personnel Management
Retirement Operations Center
Attention: Employee Survivor Team
Post Office Box 45
Boyers, Pennsylvania 16017-0045

Please help us in making sure the survivor knows that we need their application within 60 days. Otherwise, we will not be able to continue interim payments.

**OPM
Procedures:**

When we receive the FERS Death-In-Service Quick Pay information, if possible, we will immediately authorize interim monthly benefits to the surviving spouse if they are eligible for the monthly survivor benefit. If the deceased employee had a family health benefits enrollment, we also will transfer the coverage under the same plan to the surviving spouse's name if the spouse is eligible for the monthly survivor benefit. Due to tax implications, payment of the Basic Employee Death Benefit cannot be authorized prior to receipt of the signed election forms from the survivor. Therefore, it is extremely important whenever possible to have the survivor complete the forms during your counseling session. After receipt of these completed forms, we will authorize payment of the Basic Employee Death Benefit. We will subsequently complete final processing of survivor annuity benefits, if eligible, upon receipt of the remaining required documentation.

For further information or assistance, call the Retirement Operations Center at (724) 794-2005, Extension 3012. The Government-wide goal to receive all required documentation from you is still 30 days from the date of death.



Sidney M. Conley
Assistant Director
for Retirement Programs

Attachment