



Benefits Administration Letter

Number 14 - 112

Date: 10/28/2014

Subject: Standard Form (SF) 3116: Phased Employment/Phased Retirement Status Elections

Purpose: The Office of Personnel Management announces a new Standard Form, SF 3116, *Phased Employment/Phased Retirement Status Elections* that will enable employee election of phased retirement and of possible subsequent actions related to phased retirement.

Background: Employees must formally elect to enter phased retirement and while an employee in a phased retirement status, may make elections to opt out of phased retirement status or move to another agency and either maintain phased retirement status or opt out of phased retirement status. These elections must be documented on SF 3116.

The SF 3116 is divided into 3 parts will be used to elect four events:

Part 1: Election of Phased Employment/Phased Retirement

Part 2: Election to End Phased Employment/Phased Retirement and Return to Regular Employment Status

Part 3A: New Agency Consent to Continue Phased Employment/Phased Retirement

Part 3B: Election to End Phased Employment/Phased Retirement Status Upon a Move to Another Agency

Each part explains how the form must be completed and what to do with the form when it is completed. The form also provides a summary highlighting relevant information covering eligibility requirements; annuity information; military and civilian deposit rules; FEHB and FEGLI impacts on premiums; effects of returning to regular employment status; and guidance on what happens if the employee in a phased retirement status dies in service. There is also a Q&A section that discusses these and other topics in more detail.

The new form is currently available and may be downloaded from OPM's website.

Kenneth J. Zawodny, Jr.
Associate Director
Retirement Services