



United States Office of Personnel Management
The Federal Government's Human Resources Agency

Benefits Administration Letter

Number: 22-103

Date: October 7, 2022

Subject: Updates to the Data Exchange Gateway (DEG) and DEG Data Set Starter Kit

This Benefits Administration Letter (BAL) supersedes [BAL 14-105](#) and provides additional updates to the Data Exchange Gateway (DEG) and issues the revised DEG Data Set Starter Kit.

Background

The Data Exchange Gateway (DEG) is a method for agencies, payroll offices, and shared service centers to electronically transmit data to Retirement Services (RS). In 1994, OPM's Retirement Operations (RO) launched the Automated Front End Program (AFEP) to enhance the service RS delivers to retiring federal employees. Through this program, RS works in partnership with agencies, payroll offices, and shared service centers to make the transition from employee to retiree as seamless as possible.

Through the AFEP, agencies, payroll offices, and share service centers submit data via the DEG that is used by RO to automatically load OPM's financial system and annuity roll system with the necessary financial and retirement-related data. AFEP automatically establishes the retirement record and initiates its tracking. For retirees, the AFEP establishes the retirement claim, generates the annuitant identification card, transfers the health benefits administration to RO, and authorizes interim annuity payments for entitled claimants.

What's New

The DEG data set record size has increased to 500. The below charts outline updates to existing DEG data fields and the creation of new DEG data fields in response to the recent IRS changes to the W-4P form and withholding rates for annuities starting in 2022.

Updates to existing data fields:

Data Element Name	Position Number	Information
Tax Marital Status	233	Added code "H" = Head of Household
Tax Exemptions	234 – 235	This data field has changed from Required (R) to Optional (O)

Additional W-4P Tax Withholding Data:

Data Element Name	Position Number	Information
Total Other Income	312 – 317	This field is used for Step 2(b)(iii) of the W-4P form starting in 2022 and allows up to six (6) digits. Number is entered as a whole dollar amount. If there is no entry for this position, then enter zero (0).
Dependent Amount	318 – 323	This field is used for Step 3 of the W-4P form starting in 2022 and allows up to six (6) digits. Number is entered as a whole dollar amount. If there is no entry for this position, then enter zero (0).
Other Income (Not From Jobs)	324 – 329	This field is used for Step 4(a) of the W-4P form starting in 2022 and allows up to six (6) digits. Number is entered as a whole dollar amount. If there is no entry for this position, then enter zero (0).
Deduction Amount	330 – 335	This field is used for Step 4(b) of the W-4P form starting in 2022 and allows up to six (6) digits. Number is entered as a whole dollar amount. If there is no entry for this position, then enter zero (0).

Data Element Name	Position Number	Information
Extra Withholding	336 – 339	This field is used for Step 4(c) of the W-4P form starting in 2022 and allows up to four (4) digits. Number is entered as a whole dollar amount. If there is no entry for this position, then enter zero (0).
Filler Positions	340 – 500	

Final Note

All hard copy registers and records must be sent to OPM the same day the electronic DEG data set is transmitted to OPM. If they are not, the processing of retirement claims (including the authorization of the initial interim payment) may be delayed.

For questions related to this BAL, please contact the Benefits Officers Development & Outreach group at benefits@opm.gov or (202) 606-0788.

Sincerely,

Margaret Pearson
Associate Director
Retirement Services

Encl.:

1. DEG Data Set Starter Kit (revised September 2022)