



***Benefits Administration Letter***

Number 14 - 111

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**Subject: New CSRS and FERS Instruction Pamphlets Available for Completing Applications for Phased Retirement and Full Retirement Status from Phased Employment**

**Purpose:** The Office of Personnel Management announces four new Standard Form Instruction Pamphlets that accompany the CSRS Application for Retirement, SF 2801, and FERS Application for Retirement, SF 3107, when an employee applies for Phased Retirement and Full Retirement Status from phased employment.

The four instruction new instruction pamphlets are:

*SF 2825 Information and Instructions for Completing an Application for Phased Retirement under the Civil Service Retirement System (CSRS)*

*SF 2826 Information and Instructions for Completing an Application for Full Retirement Status (from Phased Retirement) under the Civil Service Retirement System (CSRS)*

*SF 3117 Information and Instructions for Completing an Application for Phased Retirement under the Federal Employees Retirement System (FERS)*

*SF 3118: Information and Instructions for Completing an Application for Full Retirement Status (from Phased Retirement) under the Federal Employees Retirement System (FERS)*

A description of each pamphlet follows.

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### **Standard Form (SF) 2825**

The **SF 2825** *Information and Instructions for Completing an Application for Phased Retirement under the Civil Service Retirement System (CSRS)* is an instructional pamphlet for Federal employees to use when completing a retirement application for phased retirement.

The pamphlet is used by Federal employees covered by the Civil Service Retirement System (CSRS) who elect to retire under the phased retirement provisions of title 5, United State Code.

This pamphlet includes information and instructions on the following areas as they apply to completing the phased retirement application for CSRS, SF 2801.

- What forms the basis for a Phased Retirement Annuity
- The formula for computing a Phased Retirement Annuity under CSRS
- Impact of not making Deposits and Redeposits under Phased Retirement
- Impact of not making a Military Deposit under Phased Retirement
- How Cost of Living Adjustments (COLA) are determined
- How Phased Retirement affects benefits under the Federal Employees Health Benefits Program (FEHBP) and the Federal Employees' Group Life Insurance (FEGLI) Program
- How Phased Retirement affects benefits under the Federal Long Term Care Insurance Program (FLTCIP); Federal Dental and Vision Program (FEDVIP); and Flexible Spending Account (FSA)
- Commencing Date of Phased Retirement
- Court Orders and Phased Retirement
- Death while in a Phased Employment/Phased Retirement status
- How to withdraw an application for Phased Retirement
- Instructions for Completing the Sections of the Application that are applicable to Phased Retirement

### **Standard Form (SF) 2826**

**SF 2826** *Information and Instructions for Completing an Application for Full Retirement Status (from Phased Retirement) under the Civil Service Retirement System (CSRS)* is an instructional pamphlet for Federal employees to use when completing a retirement application for full retirement status.

The pamphlet is used by Federal employees covered by the Civil Service Retirement System (CSRS) who elect to retire under the full retirement provisions of phased retirement.

This pamphlet includes information and instructions on the following areas as they apply to completing the phased retirement application for CSRS, SF 2801.

- How to elect Full Retirement Status under Phased Retirement
- When a Full Retirement Status is deemed
- The status for applying Deposits and Redeposits
- The status for applying Military Deposits

- The formula for computing the “Fully Retired Phased Component” under CSRS
- The formula for computing the “Composite Annuity”
- How Full Retirement Status affects benefits under the Federal Employees Health Benefits Program (FEHBP) and the Federal Employees’ Group Life Insurance (FEGLI) Program
- How Full Retirement Status affects benefits under the Federal Long Term Care Insurance Program (FLTCIP); Federal Dental and Vision Program (FEDVIP); and Flexible Spending Account (FSA)
- Court Orders and Full Retirement Status
- Death after separation from phased retirement but before filing application for Full Status Retirement
- Commencing Date of Full Retirement Status
- How Cost of Living Adjustments (COLA) are determined
- How to withdraw an application for Full Retirement Status
- Instructions for Completing the Sections of the Application that are applicable to Full Retirement Status

### **Standard Form (SF) 3117**

The SF 3117, *Information and Instructions for Completing an Application for Phased Retirement under the Federal Employees Retirement System (FERS)*, is an instructional pamphlet for Federal employees to use when completing a retirement application for phased retirement.

The pamphlet is used by Federal employees covered by the Federal Employees Retirement System (FERS) who elect to retire under the phased retirement provisions of title 5 United State Code.

This pamphlet includes information and instructions on the following areas as they apply to completing the phased retirement application for FERS, SF 3107.

- What forms the basis for a Phased Retirement Annuity
- The formula for computing a Phased Retirement Annuity under FERS
- Impact of not making Deposits and Redeposits under Phased Retirement
- Impact of not making a Military Deposit under Phased Retirement
- How Cost of Living Adjustments (COLA) are determined
- How Phased Retirement affects benefits under the Federal Employees Health Benefits Program (FEHBP) and the Federal Employees’ Group Life Insurance (FEGLI) Program
- How Phased Retirement affects benefits under the Federal Long Term Care Insurance Program (FLTCIP); Federal Dental and Vision Program (FEDVIP); and Flexible Spending Account (FSA)
- Court Orders and Phased Retirement
- Commencing Date of Phased Retirement
- Death while in a Phased Employment/Phased Retirement status
- How to withdraw an application for Phased Retirement
- Instructions for Completing the Sections of the Application that are applicable to Phased Retirement

### **Standard Form (SF) 3118**

The SF 3118, *Information and Instructions for Completing an Application for Full Retirement Status (from Phased Retirement) under the Federal Employees Retirement System (FERS)*, is an instructional pamphlet for Federal employees to use when completing a retirement application for full retirement status.

The pamphlet is used by Federal employees covered by the Federal Employees Retirement System (FERS) who elect to retire under the full retirement provisions of phased retirement

This pamphlet includes information and instructions on the following areas as they apply to completing the phased retirement application for FERS, SF 3107.

- How to elect Full Retirement Status under Phased Retirement
- When a Full Retirement Status is deemed
- The status for applying Deposits and Redeposits
- The status for applying Military Deposits
- The formula for computing the “Fully Retired Phased Component” under FERS
- The formula for computing the “Composite Annuity”
- Annuity Supplement Payments
- How Full Retirement Status affects benefits under the Federal Employees Health Benefits Program (FEHBP) and the Federal Employees’ Group Life Insurance (FEGLI) Program
- How Full Retirement Status affects benefits under the Federal Long Term Care Insurance Program (FLTCIP); Federal Dental and Vision Program (FEDVIP); and Flexible Spending Account (FSA)
- Court Orders and Full Retirement Status
- Death after separation from phased retirement but before filing application for Full Status Retirement
- Commencing Date of Full Retirement Status
- How Cost of Living Adjustments (COLA) are determined
- How to withdraw an application for Full Retirement Status
- Instructions for Completing the Sections of the Application that are applicable to Full Retirement Status

These pamphlets are currently available and may be downloaded from OPM’s website.