

## Steps Your Personnel Office Takes to Process Your Retirement Application

This document serves as a guide on how your personnel office processes your federal retirement paperwork.

Your personnel office must take the following actions to process your retirement application:

- Complete the "*Agency Checklist of Immediate Retirement Procedures*"
  - Standard Form 2801, *Application for Immediate Retirement (CSRS)*; or
  - Standard Form 3107, *Application for Immediate Retirement (FERS)*.
- Prepare and obtain your signature on the "*Certified Summary of Federal Service*"
  - Standard Form 2801-1 (CSRS); or
  - Standard Form 3107-1 (FERS).
- Verify any service not fully documented in your OPF.
  - If documentation is missing, verification may be obtained by contacting federal record centers.
  - If the personnel office is unable to obtain verification, OPM will complete verification upon receipt of your retirement application and records. However, this process will cause a delay in processing.
- Certify and transfer your coverage under the Federal Employees' Group Life Insurance (FEGLI) program to OPM.
- Certify and transfer your enrollment under the Federal Employees' Health Benefits (FEHB) program to OPM.
- Prepare Standard Form 50, "*Notification of Personnel Action*."
- Send all of your retirement materials to your payroll office.

### 1. Steps Your Payroll Office Takes to Process Your Application

After your personnel agency takes action, your agency payroll office:

- Authorizes your final pay check and lump sum payment for unused annual leave—usually within 30-45 days of your separation. Your first check may arrive as early as 2-3 weeks after OPM receives your retirement paperwork.
- Prepares your "*Individual Retirement Record*"
  - Standard Form 2806, *Individual Retirement Record (CSRS)*; or
  - Standard Form 3100, *Individual Retirement Record (FERS)*
  - Forward all retirement documents to OPM.

### 2. When OPM Receives Your Application

When OPM receives your retirement application, usually within two weeks of receipt, you will be notified and will be provided a civil service claim identification number (a seven-digit number preceded by "CSA"). You must use that identification number whenever you contact OPM about your annuity.

### 3. If You Have Questions Before You Receive Your Claim Number

If you need to contact OPM before you receive your claim number, the following steps must be taken:

- Contact your former payroll office to find the date your records were transferred to OPM.
- Your payroll office should provide you with the number and date of the Register of Separations and Transfers.
- You will also need your Payroll Identification Number.



#### 4. What OPM Does to Process Your Claim

- Obtains any information missing from your retirement documents.
- Determines your eligibility for an annuity and continued health and life insurance coverages.
- Computes the amount of your annuity.
- Sends you materials concerning:
  - your survivor benefit election;
  - the alternative form of annuity which you may elect and are approved for if you retire on a non-disability annuity and have a life-threatening affliction or other critical medical condition;
  - rollover to an IRA, or;
  - if you are a FERS MRA+10 retiree, your annuity commencing date.
- Authorizes your annuity payment which is paid by the Department of the Treasury.

#### 5. When you'll get your first payment

In most cases, as soon as OPM receives all of your retirement records, they will provide "interim" payments. These payments represent a portion of your final benefit and are usually made on the first business day of each month. OPM will try to provide you with income until they finish processing your application.

If you do not receive your payment on the first business day of the month, please call your financial institution first for information. You can report a lost or missing payment online by visiting their website at <https://www.servicesonline.opm.gov/RSR/MissingPayment>.

You may also call OPM at 888-767-6738 during regular business hours or write to:

U.S. Office of Personnel Management  
Attention: Check Loss  
Post Office Box 7815  
Washington, D.C. 20044-7815.

If you write to OPM, they ask that you sign your letter.

Notify OPM which check is missing. They will also need to know:

- your seven-digit claim identification ("CSA" or "CSF") number; and
- the date you expected to receive the missing payment. (This is to avoid any misunderstanding about which payment you have not received.)

Upon receipt of your report, OPM will notify the U.S. Department of Treasury about your missing or lost payment. If the payment has not been negotiated, they will issue you replacement payment. If the payment has been negotiated, they will send you instructions on how to file a claim for a duplicate payment.

<https://www.opm.gov/retirement-services/my-annuity-and-benefits/annuity-payments/#url=New-Retiree>

<https://www.opm.gov/faqs/topic/retire/?cid=dcd5cbac-8b07-4dd4-b362-4428e29acf61#url=should>

<https://www.opm.gov/retirement-services/csrs-information/planning-and-applying/#url=Apply>

<https://www.opm.gov/retirement-services/my-annuity-and-benefits/annuity-payments/#url=Missing-Payment>