PROCESSING RETIREMENTS and REQUESTS FOR RETIREMENT INFORMATION

Purpose

This guide outlines the handling of retirement applications and requests for retirement-related information and actions.

Definitions

- **Retirement applications** include applications for benefits under CSRS, FERS, and CSRS-Offset.
- **Retirement-related information and actions** include:
  - Preparing estimates of future retirement benefits
  - Preparing estimates and applications for Deposits and Redeposits
  - Processing Military Service Deposits
  - Certification of Applications for Voluntary Contributions
  - Review and correction Service Computation Dates (SCDs) for leave, retirement and TSP
  - Counseling regarding post-retirement benefits elections
  - Review of Official Personnel Folders (OPFs) for benefits purposes
  - Review of Designation of Beneficiary forms

Requests for Retirement Estimates

- **Mint employees** will be encouraged to contact the Benefits staff directly via e-mail or telephone. Individual counseling and guidance will be provided by Benefits Specialists.
- **Benefits Specialists** will review the employee's OPF for documentation of service, appropriate retirement coverage, documentation of benefits elections, calculation of SCDs, Designation of Beneficiary forms, eligibility to carry benefits into retirement, etc.
- **Benefits Specialists** will obtain election choices from the employee and forward completed estimate(s) to the employee via e-mail, if available. If email is not available, estimates will be forwarded via U.S. Mail to the employee's home address, or, at the employee's request, via e-mail to a Mint HR contact.
- **Benefits Specialists** will provide estimates (via e-mail or other methods above) and counseling, as necessary, regarding deposits for non-deduction service (e.g. temporary service) and redeposits for contributions previously withdrawn from the retirement system.

Retirement Applications

- A **Mint employee** ready to commit to retirement must notify his/her supervisor in writing. When the appropriate Benefits Specialist receives a copy of this notification via e-mail or fax (304-480-8281), the retirement will be assumed to be definite and the **Specialist** will proceed with preparation of the retirement application package. (It's recommended that this be done at least a month in advance to allow for processing time.) The **Specialist** will also order the Albert Gallatin award, if the employee appears eligible.
- The **Benefits Specialist** will send an e-mail notification to the current supervisor and the following Mint officials that need retirement notifications
    - sheila.williamson@usmint.treas.gov
    - carolyn.swann@usmint.treas.gov
    - megreen@usmint.treas.gov
    - vlepczyk@usmint.treas.gov
    - mholguin@usmint.treas.gov
    - marilyn.marshall@usmint.treas.gov
    - karen.willis@usmint.treas.gov
- The **Benefits Specialist** will mail to the employee's home address those retirement documents requiring the employee's signature, review the documents with the employee and provide counseling on the retirement process via telephone. The employee will return the completed documents to the Benefits Specialist via U.S. or Express Mail:

  Regular mail: U.S. Mint
  c/o Treasury/Public Debt
  Benefits, Avery 2-C
  P.O. Box 1328
  Parkersburg, WV 26106-1328

  Express mail: U.S. Mint
  c/o Treasury/Public Debt
  Benefits, Avery 2-C
  200 Third St.
  Parkersburg, WV 26106-5312
- Upon receipt of the completed/signed documents, the Benefits Specialist will complete the retirement package and forward to NFC for processing and provide the employee with a copy of the entire package.
- Upon receipt of the Albert Gallatin award (if applicable), the Specialist will forward it to the appropriate official/address indicated.
- The **Processing staff** will forward the employee's OPF to the National Personnel Records Center approximately 90 days after separation.

Requests for Retirement-related Benefits Information

- **Military Service Deposits:** Upon employee requests, **Benefits Specialists** will calculate the amounts of military deposits, forward application packages to the employees, and initiate payment of deposits through the Pay and Leave Services Branch.
- **Mint employees** will be encouraged to contact the Benefits staff directly at any time via e-mail or telephone for retirement-related benefits information. Benefits will provide individual counseling and guidance.

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