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Description
The Retirement Benefits Estimator is a web based Federal retirement benefits estimator designed for use by Federal agency retirement counselors.

Accessing the Benefits Estimator
To access the Retirement Benefits Estimator, enter your User Login and Password, then point and click on the Login button.

Retrieve an Existing Case
To retrieve an existing case, enter one of the following pieces of identifying information:
- Social Security Number
- Last Name
- Birth Date
- Case Status – (OPM use only)

Notes:
- If the SSN has been assigned to a case by an agency other than the user’s, the user will not be able to retrieve the case.
- An agency’s retirement counselor can only view that agency’s retirement estimates.

Note: If you are logging in with a temporary password, go to page 38.
Retrieve an Existing Case (Continued)

If the last name is used to retrieve a case, and there is more than one employee with the same last name, a multiple employee match screen will appear. Point and click on the name of the employee whose case you want to retrieve.
Create a New Case

To create a new case, point and click on “Create New Case” in the Main Menu. The Create New Case screen will appear. Your User Login and name, along with your agency ID number and name, will automatically appear in the fields under Case Information.

**Note:** Keyboard navigation may be done by using the Tab key rather than the mouse.

- **Agency** – The agency ID number is automatically entered.
- **Case Type** – Select a case type: (Required Field)
  - 1. CSRS or
  - 2. FERS
- **Retirement Type** – Select a retirement type: (Required Field)
  1. Voluntary
  2. Involuntary
  3. Disability
  4. Service Credit
  5. Early Out
  6. Deferred/PPD
  8. Deceased Employee
Create A New Case (Continued)

- **Last Name** – Enter customer’s last name. (Required Field)
- **First Name** – Enter customer’s first name.
- **MI** – Enter customer’s middle initial.
- **Birth Date** – Enter customer date of birth. (Required Field)
- **SSN** – Enter customer’s social security number. (Required Field)

*Note:* If the employee does not have a SSN, assign a number that begins with 999, as to not conflict with a real SSN.

- **Gender** – The screen automatically defaults to Male. If the customer is female, point and click on the radio button next to Female.
- **US Citizen** – The screen automatically enters a check in the box next to US Citizen. If the customer is a non-citizen, remove the check mark by pointing and click on the box.
- **Married** – If the customer is married, point and click on the box next to Married.

After entering all customer information, point and click on **Create New Case**. The following message will appear. Click on the OK button to continue.

![Message from webpage](image)

Header Information

Upon the creation of a new case or return to an existing case, the Benefits Estimator will automatically move to the **Header Information** screen. Here, along with the Customer Information you entered, you will enter:

- **Survivor Information**
- **Military Information**
- **Health Benefits Information**
- **Life Insurance Information**
- **Service Computation Date**
- **FERS Annuity Supplement or CSRS Offset** (if applicable).

**Correction Errors** – If any of the information entered in the Header is incorrect, make the necessary corrections.

**Saving Information** – Point and click on **(Save)** next to Header in the Main Menu, or on **Go To Save**.

*Note:* If the Retirement Type is Deceased Employee, enter the date of death in the Date of Death field under Customer Information. Otherwise, it is blocked.
Header Information (Continued)

Enter survivor information in the **Survivor Information** portion of the header screen. If there is no survivor, leave blank.

Enter the following survivor information:

- **Last Name** – Enter the survivor’s last name.
- **First Name** – Enter the survivor’s first name.
- **MI** – Enter the survivor’s middle initial.
- **SSN** – Enter the survivor’s social security number.
- **Birth Date** – Enter the survivor’s date of birth.

For Deceased Employee enter Date of Death.
Survivor Information (Continued)

- **Relation** – The program will enter the appropriate relationship based on the gender of the customer.
- **US Citizen** – If the survivor is not a US citizen, point and click on the box to remove the checkmark.
- **Survivor Options** - Select the appropriate survivor option from the drop down list.
  - **Full (CSRS)** – 55% of the retiring employee’s unreduced annuity.
  - **All (FERS)** – 50% of the retiring employee’s unreduced annuity.
  - **Half (FERS)** – 25% of the retiring employee’s unreduced annuity.
  - **None** – No survivor annuity.
  - **CSRS Partial** – A dollar amount that is more than $3600 but less than the maximum 55% of the retiring employee’s unreduced annuity.
- **Survivor Yearly Amount** - If the survivor option is a CSRS partial survivor, enter the yearly survivor dollar amount.

Military Service Information

Enter military service information, in the **Military Information** portion of the header.

- If the employee had no military service or is not paying the FERS post-56 deposit, let this portion of the header default to **None**.

- If the employee had creditable military service or is in receipt of military retired pay, select the branch of service from the drop down list in the window next to **Branch of Service**.
Military Service Information (Continued)

If the employee is in receipt of military retirement pay, select the waiver status from the drop down list in the window next to Military Retirement Pay. Otherwise, let the window default to Not Applicable.

Health Benefits Information

Enter health benefits information in the Health Benefits portion of the header. Enter the enrollment code for the health plan in the window next to Enrollment Code.
Health Benefits Information (Continued)

If the employee has no health benefits or is not eligible to continue health benefits coverage into retirement, or wishes to cancel their health benefits, enter 011 Not Enrolled.

To look up an enrollment code, click on the button marked Show HB Codes. A list of all FEHB plans will appear in another window, preceded by their enrollment codes.

<table>
<thead>
<tr>
<th>Plan Code</th>
<th>Plan Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>011</td>
<td>Not enrolled</td>
</tr>
<tr>
<td>099</td>
<td>Not enrolled</td>
</tr>
<tr>
<td>101</td>
<td>Blue Cross and Blue Shield</td>
</tr>
<tr>
<td>102</td>
<td>Blue Cross and Blue Shield</td>
</tr>
<tr>
<td>104</td>
<td>Blue Cross and Blue Shield</td>
</tr>
<tr>
<td>105</td>
<td>Blue Cross and Blue Shield</td>
</tr>
<tr>
<td>111</td>
<td>Blue Cross Blue Shield</td>
</tr>
<tr>
<td>112</td>
<td>Blue Cross Blue Shield</td>
</tr>
<tr>
<td>121</td>
<td>Principal Care Plan of St. Louis (formerly MetraHealth Care Plan of St. Louis)</td>
</tr>
<tr>
<td>122</td>
<td>Principal Care Plan of St. Louis (formerly MetraHealth Care Plan of St. Louis)</td>
</tr>
</tbody>
</table>

Enter the appropriate 3-digit enrollment code on the Estimator. If not enrolled, please enter 011. Click Go to Save.

Life Insurance Information

Enter life insurance information in the Life Insurance Information portion of the header.

**Note:** When entering header information for Deceased Employee, the Life Insurance Information fields are blocked.

- Basic Insurance – In the window next to Basic, enter Basic Insurance amount. (Generally the Basic Insurance amount is the final salary rounded up to nearest thousandth dollar, plus two thousand.) Enter only the number of thousands. (e.g. $57,000 = 57)
Life Insurance Information  
(Continued)

- **Post Retirement Reduction** – From the drop down list in the window next to Post-Retirement Reduction, select the level of Basic Life Insurance desired.

- **Option A – Standard Optional Insurance** - Enter the amount of Option A - Standard Optional Insurance in the field next to Standard. (e.g. $10,000 = 10)

  If the employee did not elect Option A or is not eligible to continue Option A into retirement, leave blank.

- **Option B – Additional Optional Insurance** - Select the number of multiples and the level of coverage from the drop down list.

  If the employee did not elect Option B or is not eligible to continue Option B into retirement, let the field default to “None”.
• **Option C – Family Optional Insurance** - Select the number of multiples and the level of coverage from the drop down list.

If the employee did not elect Option C or is not eligible to continue Option C into retirement, let the field default to “None”.

To delete life insurance information, delete the Basic amount. When the file is saved the life insurance information will be deleted.

---

Other Information

**Service Computation Date** – Enter the service computation date in the field next to Service Computation Date.

**CSRS Offset Years** – Enter the number of years of CSRS offset service in the field next to CSRS Offset Years. *Note: If the annuity estimate is a FERS estimate, the CSRS Offset Years field is disabled.*
Other Information (Continued)

- **Need Windfall Elimination** – To compute the Windfall Elimination, put a check in the box next to **Need Windfall Elimination**. (Not needed for straight FERS, or with 30 years of substantial earnings.)

---

**Service Information**

To enter the employee’s service information, click on **Service** in the **Main Menu**.

---

- **Case Type** – The case type field will populate with the information entered when the case was created.

- **Retirement Type** – The retirement type field will populate with information entered when the case was created.

- **Part Time Needed** – If there is part time service present in the employee’s service history, and the employee is:
  - CSRS w/part time service after 4/7/86
  - Straight FERS
Service Information (Continued)

- **FERS Transfer w/part time service after 4/7/86.** Point and click on the Part Time Needed box. This will expand the service line to enable coding of part-time service. 
  
  *(See: Entering Part Time Service)*

- **Frozen Unused Sick Leave** – Unused sick leave balance at the time of the FERS election. This field is hidden if the Case Type is CSRS.

- **Final Unused Sick Leave** – Unused sick leave balance at the time of retirement.

- **Projected Sick Time**
  
  - **CSRS or FERS** – Enter the amount of unused sick leave projected to retirement.
  
  - **FERS Transfer** – Enter the amount of unused sick leave projected to retirement or the amount of unused sick leave at transfer to FERS, whichever is lesser.

- **FERS V.A. Registered Nurse** – Prior to 01/01/2014, only Registered Nurses with occupational codes of 0610 and 0605 qualified to receive 100% of their unused sick leave at the time of retirement. This field is visible only if:
  
  - the retirement counselor who is currently logged on belongs to the Veterans Administration, and
  
  - the Case Type is FERS.

**Overseas Service**

If the employee had **Overseas Service**, point and click on the box next to **Overseas**. FERS and CSRS fields will appear. Enter the amount of Overseas Service in months and years.
Add, Update or Delete Existing Information

In this section of Service Information lines of service can be added, updated, or deleted.

• **Add Service Information** – Begin entering the employee’s service information in the line beneath Row 1. Start with the earliest period of creditable service.

• **Date** – Enter the beginning date of the first period of creditable service. (MMDDYY)
Add, Update or Delete Existing Information (Continued)

- **Retirement Code** – Select the retirement code from the list box under Retirement Code.
  1. **CSRS** – Any service creditable under the Civil Service Retirement System.
  2. **FERS** – Any service creditable under the Federal Employees Retirement System.
  3. **Interim** – CSRS service from 01/01/84 to 12/31/86 for which both retirement and social security deductions were made.
  4. **CSRS Offset** – CSRS service for which both retirement and social security deductions were made.
  5. **Stop Credit** – Used to stop credit when coding WAE or Intermittent service.
  6. **Separation** – Used at the end of a period of service.
  7. **Death** – Use on the date of death.

- **Non-Credit Time/Computation** – Used to indicate service that is not creditable for title or computation, i.e. FICA service on or after 01/01/89 in a FERS retirement.

- **Last Day of Pay** – Used to indicate the last day the employee was in a pay status. This is needed for disability retirement and may be used for CSRS retirements.

- **Phased** – Used to indicate the Phased Retirement commencing date. Like 9-Retirement, nothing is to be coded after this entry.

- **Service Code** – Select a service code from the dropdown list under Service Code that describes the service being entered.
Add, Update or Delete Existing Information (Continued)

1. Civilian Covered Service – Creditable civilian CSRS or FERS service for which retirement deductions were withheld.
2. Creditable Military – Creditable military service under CSRS or FERS. (Pre 1/1/57 service or paid Post-56)
3. Unpaid FICA - Any civilian service for which retirement deductions were not withheld. (Requires an entry in the Amount field.)
4. Paid FICA – Any civilian service for which a deposit was paid.
5. Unpaid Redeposit – Any period of CSRS service for which retirement deductions were refunded and not repaid.
6. Pre 10/90 Refund – Identifies a CSRS refund that was made prior to 10/1/90. (Requires an entry in the Amount field.)
7. Post 10/90 Refund – Identifies a CSRS refund that was made on or after 10/1/90. (Requires an entry in the Amount field.)
8. Catch 62 – Creditable CSRS post-56 military service for which a deposit was not made and the employee was first hired after 10/1/82. If the employee is eligible for Social Security at age 62, the military service is eliminated from the annuity computation.
9. Refunded CSRS Creditable as FERS – Refunded CSRS service (not Offset or Interim service) based on an application filed before FERS coverage began and totaling less than five years. A FERS deposit must be made to receive credit. (Require an entry in the Amount field.)

B: 535 CBPO – Identifies CBPO service under PL 110-161, effective 07/06/2008.
C: Law Enforcement/FF – Law enforcement or firefighter service.
D: Unpaid FICA-6C – Identifies unpaid FICA service that may be needed to meet title for a LEO/FF retirement.
E: Unpaid Redeposit-6C – Identifies unpaid refunded service that may be needed to meet title for a LEO/FF retirement.
F: Pre 10/90 Ref-6C – Represents the date/amount of refund of refunded LEO/FF service that ended prior to 10/01/1990.
G: Post 10/90 Ref-6C – Represents the date/amount of refund of refunded LEO/FF service that ended on or after 10/01/1990.
H: Refunded CSRS-6C creditable as FERS-6C – Represents a period of refunded CSRS LEO/FF service that, if paid, will be creditable towards FERS.
Add, Update or Delete Existing Information (Continued)

P: **Phased** – Identifies the date Phased service began.

L: **Refund** – Identifies the date and amount of a refund payment for non-enhanced benefit service (EBS), i.e., law enforcement officer, firefighter, Customs and Border Protection Officer, that was subject to standard FERS retirement deductions. Enter the date and amount from the refund stamp on the Individual Retirement Record. If part of the refund period(s) was EBS, use L or M (see below) based on the nature of the service at separation.

M: **Refund-6C** – Identifies the date and amount of a refund payment for enhanced benefit service (EBS), i.e., law enforcement officer, firefighter, Customs and Border Protection Officer, that was subject to higher FERS retirement deductions. Enter the date and amount from the refund stamp on the Individual Retirement Record. If the entire refund period(s) was not EBS, use L (see above) or M based on the nature of the service at separation.

- **Amount** – Enter a dollar amount for Service Codes which require an entry in the Amount field.

![Screen Shot](image.png)
Add, Update or Delete Existing Information (Continued)

- **Multiplier** – For types of service that require an entry in the Amount field, select a multiplier code from the Multiplier drop down list to describe that amount.

**Multipliers**

1. **Annual** – Annual salary rate.
2. **Earnings** – Earnings for a particular service credit period.
3. **Hourly** – Hourly rates of pay.
5. **FERS APS** – FERS additional pay status. (contributions)
6. **CSRS APS** – CSRS additional pay status. (contributions)
7. **FERS 6c APS** – FERS law enforcement/firefighter additional pay status. (contributions)
8. **CSRS 6c APS** – CSRS law enforcement/firefighter additional pay status. (contributions)
9. **Postal Flex Hourly** – Postal flex hourly pay rate.
   A. **Limited Tour** – Postal limited tour hourly pay rate.
   B. **Amount** – Amount of refund.
   C. **Deductions** – Deductions for a period of refunded service.

*Note: If the Retirement Code, Service Code, Amount, or Multiplier changes during a period of service, whether it is covered service or deposit/redeposit service, a new line of service is required for each change.*

*Note: Once done entering a line, click on and continue entering.*
Add, Update or Delete Existing Information (Continued)

- **Ending a Period of Service** – To end a period of service, enter the ending date of the service, plus one day and the Retirement Code - 8. Separation.

Continue entering all periods of creditable service in this manner. When the retirement date is reached, use the Retirement Code - 9. Retirement. Remember to add a day.

**Reminder:** To add a new service line click on either the Add a New Row button or the Save button. To delete a service line, point and click on the Delete box next to the row number, then point and click on the Save button.

**Note:** Whenever applicable, the Retirement Benefits Estimator will automatically enter a 10/01/82 line and/or a 01/01/70 line.
Time Converter  The FACES Time Converter can be used to convert both WAE hours and WAE days to calendar time, summarize the service and send it to the Service screen.

Accessing the Time Converter

1. Log on to the FACES Retirement Estimator.
2. On the Main Menu point and click on TC WAE.

Entering WAE Service

The Time Converter WAE screen appears when TC WAE is selected. Here each period of WAE service is added, updated or deleted.
Entering WAE Service (Continue)

There are four fields where information must be entered.

1. The Start Date of each period of WAE service.
2. The Time Units. (Number of hours or days worked)
3. A Multiplier.
4. Retirement description.

- In the field under Start Date enter the beginning date of the period of WAE service to be converted.
- In the field under Time Units enter the number of hours or days to be converted.
- In the field under Multiplier select a Multiplier from the dropdown list.
  1. Non-Postal Effective 3/1/1986 (2087)
  2. Non-Postal Before 3/1/1986 (2080)
  3. Postal FT, NTFT, LT, RCA/RCR (2080)
  7. Postal Flex Effective 7/1/1945 (2024)
  8. 260 Day Chart Conversion

- In the field under Retirement select a retirement type from the dropdown list.
  1. CSRS
  2. FERS
  3. Interim
  4. Offset
Entering WAE Service (Continue)

- After the fields are filled in, double check to see that all information is correct. Then point and click on the **Save and Calculate** button.

The Time Converter will convert the time Units into Years, Months and Days and will show a Stop (credit) Date. As with the service screen, a blank line is added for entering additional periods of WAE service, and converted service is moved up. To convert another period of service, proceed as above and Save and Calculate.

**Note 1:** Be sure that the start date and the multiplier are compatible. For example, WAE service in 1985 cannot be converted using Non-Postal Effective 3/1/1986. If this happens an error message will appear.

**Note 2:** There are two non-postal multipliers for 1986. If at all possible enter the pre-3/1/1986 hours separately from the hours worked on or after 3/1/1986.

**Note 3:** Keep in mind that the number of hours/days worked cannot exceed calendar time. For example if a person works 265 days in a calendar year, the time credited cannot exceed a year.
Correcting Data Entry Errors

There are two ways to correct data entry errors.

1. Go to the field where the error is discovered and highlight the field. Enter the correct information and click on Save and Calculate.

2. Go to the line where the error is discovered, click on the check box in front of the Start Date and then on Save and Calculate. The total line will be deleted from the time conversion.

Time Converter Summary

Any time during the time conversion process the Time Converter Summary may be viewed. To view the time Converter Summary point and click on TC Summary in the Main Menu.
Time Converter Summary (Continue)

The **Time Converter Summary** shows the service for each year that was entered. It also shows the type of calculation, whether hours or days, the Start Credit Date, the Stop Credit Date, and the total Years, Months and Days of credit for each period of service.

**Note:** If there is more than one period of service in any year, the Time Converter Summary will combine those periods of service to give the correct Stop Credit Date.

<table>
<thead>
<tr>
<th>Row</th>
<th>Send</th>
<th>Calc</th>
<th>Start Credit</th>
<th>Stop Credit</th>
<th>Years</th>
<th>Months</th>
<th>Days</th>
<th>Retirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>☑</td>
<td>Hours</td>
<td>9/1/1985</td>
<td>1/12/1985</td>
<td>0</td>
<td>3</td>
<td>24</td>
<td>CSRS</td>
</tr>
<tr>
<td>2</td>
<td>☑</td>
<td>Hours</td>
<td>1/1/1986</td>
<td>5/22/1986</td>
<td>0</td>
<td>4</td>
<td>21</td>
<td>CSRS</td>
</tr>
<tr>
<td>3</td>
<td>☑</td>
<td>Days</td>
<td>1/1/1987</td>
<td>8/3/1987</td>
<td>0</td>
<td>7</td>
<td>2</td>
<td>FERS</td>
</tr>
</tbody>
</table>

**Send to Service**

Determine which service is to be sent to the Service screen. Note that at the beginning of each line of service there is a box with a check mark. Each line that is checked will be sent to the service screen. If the check mark at the beginning of the line is removed, the service will not pass to the Service screen. To send the service in the Time Converter Summary to the Service screen, point and click on **Send To Service**.
Send to Service

(Continue)

Only service that is not duplicated in the Service screen will pass to Service. If there are duplicate service lines, the following error message will appear:

![Error Message]

If the above error message appears, do one of two things:

1. Delete the conflicting service line from the Service screen, or
2. Remove the check mark from the conflicting service line so the service is not sent.

After removing the error, resend the service from the Time Converter Summary to the Service Screen.

Service Screen

Open the Service screen. Note that all service transferred from the Time Converter Summary is indicated by an asterisk at the beginning of the service line. Check over the Service screen. If all of the service information is correct, continue processing the case as normal. **NOTE:** All information sent from the TC Summary will be coded as 1-Civilian Covered Service. If it is something other than 1-Civilian Covered Service, you must correct it.

If for any reason it is necessary to delete a line of service, put a check mark in the box at the beginning of the line and click on Save.
Entering Part Time Service

Check the **Part Time Needed** box if there is part-time service in the employee’s service history and the estimate is one of the following:

- **CSRS w/ part-time service on or after 4/7/86** – Code full-time prior to 4/7/86 (leave hours and tour blank). Code full-time and part-time hours or tour on or after 4/7/86.
- **Straight FERS** – Code all service both full-time and part-time before and after 4/7/86. Enter all full-time and part-time hours or tours.
- **FERS Transfer w/part-time service on or after 4/7/86** – Code full-time prior to 4/7/86 (leave hours and tour blank). Code full-time and part-time hours or tours on or after 4/7/86.

Click on the ⬅️ button to hide the Main Menu and expand the Service screen to better view Part Time-related edit fields. Click on the ➤️ button at any time to restore the Main Menu.

---

**Service for John Doe**

<table>
<thead>
<tr>
<th>Service Information</th>
<th>Part Time Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Type:</td>
<td>1: Voluntary</td>
</tr>
<tr>
<td>Retirement Type:</td>
<td></td>
</tr>
<tr>
<td>FERS</td>
<td></td>
</tr>
</tbody>
</table>

**Add, Update or Delete Existing Information**

Remember to add one day to any separation, retirement, or death date.

An asterisk under the TC column signifies line was added by Time Converter.
Entering Part Time Service (Continued)

1. Begin by entering the beginning date of the part-time service under **Date** (MMDDYY).

   ![Beginning Date]

2. Enter the type of service under **Retirement Code**. Click on the field and select the appropriate retirement code.

   ![Retirement]
Entering Part Time Service  
(Continued)  

Retirement Codes:  
1:  **CSRS** – Any service creditable under the Civil Service Retirement System.  
2:  **FERS** – Any service creditable under the Federal Employees Retirement System.  
5:  **Interim** – CSRS service from 01/01/84 to 12/31/86 for which both retirement and social security deductions were made.  
6:  **CSRS Offset** – CSRS service for which both retirement and social security deductions were made.  
7:  **Stop Credit** – Used to stop credit when coding WAE or Intermittent service.  
8:  **Separation** – Used at the end of a period of service.  
9:  **Retirement** – Used at the end of the final period of service.  
D:  **Death** – Used on the date of death (plus one day).  
N:  **Non-Credit Time/Computation** – Used to indicate service that is not creditable for title or computation, i.e. FICA service on or after 01/01/89 in a FERS retirement.  
L:  **Last Day of Pay** – Used to indicate the last day the employee was in a pay status. This is needed for disability retirement and may be used for CSRS retirements.  
P:  **Phased** – Used to indicate the Phased Retirement commencing date. Like 9-Retirement, nothing is to be coded after this entry.  

3.  In the field under Service Code enter the type of service performed by the employee.
Service Codes:

1: **Civilian Covered Service** – Creditable civilian CSRS or FERS service for which retirement deductions were withheld.

2: **Creditable Military** – Creditable military service under CSRS or FERS. (Pre 1/1/57 service or paid Post-56)

3: **Unpaid FICA** – Any civilian service for which retirement deductions were not withheld. (Requires an entry in the Amount field.)

4: **Paid FICA** – Any civilian service for which a deposit was paid.

5: **Unpaid Redeposit** – Any period of CSRS service for which retirement deductions were refunded and not repaid.

6: **Pre 10/90 Refund** – Identifies a CSRS refund that was made prior to 10/1/90. (Requires an entry in the Amount field.)

7: **Post 10/90 Refund** – Identifies a CSRS refund that was made on or after 10/1/90. (Requires an entry in the Amount field.)

8: **Catch 62** – Creditable CSRS post-56 military service for which a deposit was not made and the employee was first hired before 10/1/82. If the employee is eligible for Social Security at age 62, the military service is eliminated from the annuity computation.

9: **Refunded CSRS Creditable as FERS** – Refunded CSRS service (not Offset or Interim service) based on an application filed before FERS coverage began and totaling less than five years. A FERS deposit must be made to receive credit. (Requires an entry in the Amount field.)

B: **535 CBPO** – Identifies CBPO service under PL 110-161, effective 07/06/2008.

C: **Law Enforcement/FF** – Law Enforcement or Firefighter service.

D: **Unpaid FICA-6C** – Identifies unpaid FICA service that may be needed to meet title for a LEO/FF retirement.

E: **Unpaid Redeposit-6C** – Identifies unpaid refunded service that may be needed to meet title for a LEO/FF retirement.

F: **Pre 10/90 Ref-6C** – Represents the date/amount of refund of refunded LEO/FF service that ended prior to 10/01/1990.

G: **Post 10/90 Ref-6C** – Represents the date/amount of refund of refunded LEO/FF service that ended on or after 10/01/1990.
Entering Part Time Service  
(Continued)

**H:** Refunded CSRS-6C creditable as FERS-6C – Represents a period of refunded CSRS LEO/FF service that, if paid, will be creditable towards FERS.

**L:** Refund – Identifies the date and amount of a refund payment for non-enhanced benefit service (EBS), i.e., law enforcement officer, firefighter, Customs and Border Protection Officer, that was subject to standard FERS retirement deductions. Enter the date and amount from the refund stamp on the Individual Retirement Record. If part of the refund period(s) was EBS, use L or M (see below) based on the nature of the service at separation.

**M:** Refund-6C – Identifies the date and amount of a refund payment for enhanced benefit service (EBS), i.e., law enforcement officer, firefighter, Customs and Border Protection Officer, that was subject to higher FERS retirement deductions. Enter the date and amount from the refund stamp on the Individual Retirement Record. If the entire refund period(s) was not EBS, use L (see above) or M based on the nature of the service at separation.

**P:** Phased – Identifies the date Phased service began.

*Note:* If the service code is one that does not require an entry in the Amount field, the Amount and Multiplier fields will not appear.

4. If required, enter a monetary amount in the Amount field.

![Service for John Doe](image)
5. In the field under **Multiplier**, select the appropriate multiplier for any unpaid deposit.

6. In the field under **Part Time Multiplier**, select the appropriate multiplier type from the list box.

**Part Time Multipliers:**
- 1 = **Postal Flex Hourly** – Part-time Postal service with no established tour
- 2 = **Postal FT** – Full time Postal Service
Entering Part Time Service (Continued)

3 = Limited Tour – Part-time Postal Service with an established tour
4 = Non Postal PT – Non Postal Part-time service
5 = Non Postal FT- Non Postal Full-time service
6 = VA PT DMS – Part-time Department of Medicine and Surgery Service (V.A. cases)
7 = Military – Military Service

7. Enter the hours worked in the field under Hours Worked, or the Tour of Duty by entering the scheduled hours worked in the first field and the number of hours in either the week (40) or the pay period (80) in the second. (e.g. If the employee worked 30 hours per 80 hour pay period, enter 30 in the first field and 80 in the second field. 15-40 would also be acceptable.)

Continue entering service as you would with full-time service using the proper ending code at the end of each period of service.
Entering Part Time Service (Continued)

Note: If the Retirement Code, Service Code, Amount, or Multiplier changes during a period of service, whether it is covered service or deposit/redeposit service, a new line of service is required for each change.

Note: Whenever applicable, the Retirement Benefits Estimator will automatically enter a 10/01/82 line and/or a 01/01/70 line.

Salary Screen

The employee’s salary information is entered in Salary screen. To access the Salary screen, click on Salary in the Main Menu.

Coding Average Salary

Coding Regular Average Salary – To code an average salary involving only regular covered service with no deposit service or part-time service in the average salary period:

1. Enter the beginning date of each salary rate in the Date field.
2. Enter the salary rate in the Amount field.
3. In the field under Multiplier, select the appropriate multiplier to describe the amount in the Amount field.
Coding Average Salary (Continued)

4. Repeat steps 1 through 3 for each pay change.

5. Enter the ending date of the period plus one day with no salary amount. (The ending date defaults to the Retirement date entered in the Service screen.)

**Note:** If there are breaks in service entered in the Service screen that occur during the average salary period, the same breaks must be coded in the Salary screen.
**Coding Average Salary with Part-time Tour** – To code the average salary involving a part-time tour of duty:

1. Point and click on the box next to **Part Time Needed**.
2. Enter the beginning date of each salary rate in the **Date** field.

3. Enter the salary rate in the **Amount** field.
4. In the field under **Multiplier**, select the appropriate multiplier to describe the amount in the **Amount** field.
5. In the field under Tour of Duty enter the tour of duty during the time the salary rate was in effect. For example, if the tour of duty was 28 hours per week, enter 28 in the first box and 40 in the second box.

6. Repeat steps 2 through 6 for each pay change.

7. Enter the ending date of the average salary period plus one day with no salary amount.

**Note:** It is only necessary to enter the tour of duty at the beginning of each period of part-time service or when the tour of duty changes.
Address

Contact information along with the employee’s EFT routing information is entered in the Address screen. To access the Address screen, point and click on Address in the Main Menu.

1. Begin by entering the employee’s telephone number and email address, if one is available.
2. Enter the employee’s address as it will appear in the mainframe. It may be necessary to abbreviate some words in the employee Name and Address lines as each line is limited to 22 characters including spaces.

3. Enter the employee’s full address, as used for correspondence, in Address for Letters.
4. Enter the EFT information in EFT Routing. Enter the bank routing number in the field next to EFT Routing Number.
5. Select the Account Type by pointing and clicking on the radio button next to Checking or Savings.
6. Enter the Checking or Savings account number in the field next to Account Number.
Address

(Continued)

Point and Click on the Save button to save the information entered.

*Note: Address information is not required to compute an annuity estimate.*

Memos

To enter any internal memos concerning the employee’s retirement estimate, point and click to Memos in the Main Menu. Once the memo is entered point and click on the Save button.

The memo is dated and saved. To update or delete an existing memo, click the checkbox next the row to be deleted and then click Save.

*Note: If the Internal User box is unchecked, the memos will appear on the estimate printout.*
Earnings Information

Earnings Information is used to estimate the FERS annuity supplement, CSRS Offset, or Windfall Elimination. Earnings may be obtained from the employee’s annual Social Security estimate.

- **Contributions Needed**
  If annual retirement contributions are available, they may be used in lieu of the earnings. Put a check mark in the Contributions Needed box, otherwise use earnings.

- **FERS Annuity Supplement Information**
  For employees who are eligible for a FERS Annuity Supplement, FACES will automatically determine the first full year of FERS service and the year the Annuity Supplement begin.

Values used by FACES to compute the annuity supplement estimate may be overridden by entering a different year (YYYY) in the field marked **First Full Calendar Year of FERS Contributions** and/or **Year the Annuity Supplement Begins**.

**Note:** The Annuity Supplement Information fields are disabled if the estimate is a CSRS estimate or a Deceased Employee.
Earnings Information (Continued)

1. Begin entering earnings information by selecting the earnings/contributions type from the dropdown list.
   - CSRS
   - FERS

2. Enter the earnings **Year**. (YYYY)
   - For Annuity Supplement, enter only full years of earnings. If contribution information is available, check the box marked Contributions Needed.
   - For CSRS Offset, enter both full and partial years of earnings.

3. Enter Earnings, **both dollars and cents, with a decimal point**. ($$$$.¢¢)

4. Point and click on **Add a New Row** and continue in the same manner as above.

As each year is saved a new line of Earnings/Contributions will appear. To delete a line of Earnings/Contributions, click on the box under **Delete** and then click on the **Save** button.
1. Enter contributions information by selecting the contributions type from the dropdown list.
   - CSRS
   - FERS
2. Enter the contributions **Year**. (YYYY)
3. Enter Contributions, **both dollars and cents, with a decimal point**. ($$$$.¢¢)
4. Select the **Multiplier** for the contributions.
5. Point and click on **Add a New Row** and continue in the same manner as above.
Disability Information

For Disability estimates:
1. Disability must be selected as Retirement Type in order to compute a disability estimate.
2. In the field next to SSA Offset Amount, enter the monthly amount of the employee’s SSA disability benefit, rounded up to the nearest dollar. This amount is available from the annual benefits statement received from Social Security.
3. In the field next to Date SSA Offset Applies, enter the effective date of the SSA disability benefit. (MMDDYY)

Retirement Estimate

To compute the estimate, point and click on Estimate in the Main Menu. The estimate will appear in the following format. If there are multiple annuity computations, a Benefits Summary will appear as part of the estimate, showing the annuity with and without deposits and/or redeposit made.
Retirement Estimate (Continued)

Benefits Summary

Based on your service history, there were one or more periods of service where contributions were refunded to you. You may choose to increase your monthly annuity by repaying the contributions, with interest. To help you understand the impact of certain repayments, we have provided the following information:

<table>
<thead>
<tr>
<th>BENEFITS</th>
<th>Basic Annuity refer to page 2</th>
<th>To receive the annuity listed below, you will need to pay at:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total computation service</td>
<td>25 / 4 / 0</td>
<td>deposit(s) and/or redepot(s) of $5,453 refer to page 3</td>
</tr>
<tr>
<td>Years/Months/Days</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual</td>
<td>19,404</td>
<td>19,512</td>
</tr>
<tr>
<td>Survivor Annuity Reduction</td>
<td>1,940</td>
<td>1,953</td>
</tr>
<tr>
<td>Annual Gross Annuity</td>
<td>17,464</td>
<td>17,579</td>
</tr>
<tr>
<td>Monthly Gross Annuity</td>
<td>1,455</td>
<td>1,464</td>
</tr>
<tr>
<td>REDUCTIONS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HB Premium</td>
<td>217.06</td>
<td>217.06</td>
</tr>
<tr>
<td>LI Premium</td>
<td>423.13</td>
<td>423.13</td>
</tr>
<tr>
<td>Monthly Net Annuity</td>
<td>814.81</td>
<td>823.81</td>
</tr>
</tbody>
</table>

Please be advised, this is an estimate based on the information you provided. Also, because various rounding techniques are used, the column amounts may not sum to the column total. Finally, this is a pre-tax estimate, no Federal, State or Local taxes have been included in this estimate.

Unpaid Redeposit Information and Service Time

RETRIEVAL ESTIMATE FOR: JOHN DOE

Date: 3/30/2016
Retirement Type: FERS Voluntary

Unpaid Deposit and Redeposit Information

FERS Redeposit Amount: $5,453.00

Service Time

<table>
<thead>
<tr>
<th>FERS Computation Credit</th>
<th>25 Years</th>
<th>4 Months</th>
<th>0 Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Computation Credit</td>
<td>25 Years</td>
<td>4 Months</td>
<td>0 Days</td>
</tr>
<tr>
<td>Total Title Credit(1)</td>
<td>25 Years</td>
<td>6 Months</td>
<td>2 Days</td>
</tr>
</tbody>
</table>

(1) Computation and title credit may differ if certain unpaid deposit and or redeposit service exists
FERS part-time proration factor: 96%
Retirement Estimate (Continued)

Annuity Estimate Without Redeposit Paid and Estimated Deductions

<table>
<thead>
<tr>
<th>Estimated Benefits</th>
<th>Annually</th>
<th>Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>FERS - Basic Annuity</td>
<td>$19,404</td>
<td>$1,617</td>
</tr>
<tr>
<td>Cost of Survivor Benefits (All FERS)</td>
<td>-1,940.41</td>
<td>-161.70</td>
</tr>
<tr>
<td>Estimated Gross Annuity</td>
<td>17,464</td>
<td>1,455</td>
</tr>
<tr>
<td>Surviving Spouse’s Annuity</td>
<td>9,696.00</td>
<td>808.00</td>
</tr>
<tr>
<td>FERS Annuity Supplement that will begin in 2017</td>
<td>13,968.00</td>
<td>1,164.00</td>
</tr>
</tbody>
</table>

This is based on an estimated social security benefit of $1,163.

Estimated Deductions Using Current Premiums

<table>
<thead>
<tr>
<th>Estimated Gross Annuity</th>
<th>Annually</th>
<th>Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Insurance Premium (104: Blue Cross and Blue Shield)</td>
<td>-2,604.72</td>
<td>-217.06</td>
</tr>
<tr>
<td>Life Insurance Premium</td>
<td>-5,077.56</td>
<td>-423.13</td>
</tr>
<tr>
<td>Estimated Net Benefits</td>
<td>9,777.72</td>
<td>814.81</td>
</tr>
</tbody>
</table>

Please be advised, this is an estimate based on the information you provided. Also, because various rounding techniques are used, the column amounts may not sum to the column total. Finally, this is a pre-tax estimate, no Federal, State or Local taxes have been included in this estimate.

Life Insurance and Salary Recap

<table>
<thead>
<tr>
<th>Coverage at Retirement</th>
<th>Monthly Premium at Retirement</th>
<th>Monthly Premium at age 65</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic: $85,000</td>
<td>$27.63</td>
<td>$0.00</td>
</tr>
<tr>
<td>75%</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Additional (Option D): 50% Non-reduced</td>
<td>$415,000</td>
<td>$395.50</td>
</tr>
</tbody>
</table>

Salary Recap

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/12/2014</td>
<td>75,123.00</td>
<td>Annual</td>
</tr>
<tr>
<td>1/11/2015</td>
<td>78,456.00</td>
<td>Annual</td>
</tr>
<tr>
<td>1/10/2016</td>
<td>82,789.00</td>
<td>Annual</td>
</tr>
<tr>
<td>5/31/2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Retirement Estimate

(Continued)

High-3 Average Salary Analysis and Service and Earnings Recap

Main Menu

Create New Case
Retrieve Case
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Memo
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Post 56 Military
SSA Website
TSP Website
Change Password
Select Environment

Average Salary Recap

<table>
<thead>
<tr>
<th>Average Salaries</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>AvgSal #1 FT</td>
<td>$79,787</td>
</tr>
</tbody>
</table>

High-3 Average Salary Analysis

6/1/2014 to 5/31/2017

The average salary for that period is $79,787.00

<table>
<thead>
<tr>
<th>Salary Start Date</th>
<th>Salary End Date</th>
<th>Annual Salary</th>
<th>Factor</th>
<th>Total Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/1/2014</td>
<td>1/10/2015</td>
<td>76,123.00</td>
<td>0.61111</td>
<td>45,908</td>
</tr>
<tr>
<td>1/11/2015</td>
<td>1/9/2016</td>
<td>78,456.00</td>
<td>0.997222</td>
<td>78,238</td>
</tr>
<tr>
<td>1/10/2016</td>
<td>5/31/2017</td>
<td>82,789.00</td>
<td>1.391666</td>
<td>115,215</td>
</tr>
</tbody>
</table>

239,361

Service Recap

<table>
<thead>
<tr>
<th>Date</th>
<th>Retirement Code</th>
<th>Service Code</th>
<th>Amount</th>
<th>Multiplier</th>
<th>Hours</th>
<th>Total Hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/1/1978</td>
<td>Offset</td>
<td>Unpaid Redep</td>
<td>40:40</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/26/1979</td>
<td>Separation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3/31/1979</td>
<td>Offset</td>
<td>Retain</td>
<td>756.32</td>
<td>30:30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/1/1992</td>
<td>FERS</td>
<td>Civilian</td>
<td>40:80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7/10/1993</td>
<td>FERS</td>
<td>Civilian</td>
<td>40:80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/20/1993</td>
<td>FERS</td>
<td>Civilian</td>
<td>40:80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6/1/2017</td>
<td>Retirement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Earnings Recap

<table>
<thead>
<tr>
<th>Retirement Code Year</th>
<th>Earnings</th>
<th>Contributions</th>
<th>Multiplier</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSRS 1978</td>
<td>159.63</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CSRS 1979</td>
<td>425.69</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FERS 1992</td>
<td>48,512.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FERS 1993</td>
<td>54,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FERS 1994</td>
<td>55,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FERS 1995</td>
<td>66,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Error Messages

If any information is missing or incorrectly entered which prevents the Benefits Calculator from successfully computing a benefit, an error message, similar to the one shown, will appear listing the validation errors. You must correct these errors before proceeding with the estimate calculation.
Survivor Estimate

Employee Information & Service Credit

SURVIVOR ESTIMATE FOR: FRED KELLY
Date: 4/12/2010

Employee Information:
- SSN: 301-49-8761
- Final Salary: $51,250.00
- Birth Date: 5/23/1942
- High-3 Average Salary: $59,439
- Service Computation Date: 4/2/1951
- Frozen Unused Sick Leave: 0
- Survivor Annuity Commencing Date: 4/24/2004
- Reserve Sick Leave: 0
- Survivor: All (FERS)

Unpaid Deposit and Redeposit Information:
- Unpaid Pre-1982 Deposit Amount: $522.00

Service Time:
- CSRS Computation Credit: 25 Years 8 Months 22 Days
- FERS Computation Credit: 17 Years 3 Months 23 Days
- Total Computation Credit: 43 Years 0 Months 22 Days
- Total Title Credit(1): 43 Years 0 Months 22 Days

Estimated Benefits

<table>
<thead>
<tr>
<th>Estimated Benefits</th>
<th>Annually</th>
<th>Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>FERS - Basic Annuity</td>
<td>$32,053</td>
<td>$2,671</td>
</tr>
<tr>
<td>Unpaid Deposit Reduction</td>
<td>52</td>
<td>4</td>
</tr>
<tr>
<td>Cost of Survivor Benefits (All FERS)</td>
<td>3,200.07</td>
<td>266.67</td>
</tr>
<tr>
<td>Estimated Gross Annuity</td>
<td>28,801</td>
<td>2,400</td>
</tr>
<tr>
<td>Surviving Spouse's Annuity</td>
<td>15,906.00</td>
<td>1,333.00</td>
</tr>
</tbody>
</table>

Surviving Spouse's Annuity Amount:
- BEDE Benefits: $50,491.19
- BEDE 36 payments: $1,549.68

Estimated Deductions Using Current Premiums:

<table>
<thead>
<tr>
<th>Estimated Survivor Annuity</th>
<th>Annually</th>
<th>Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Insurance Premium (FVE - Blue Cross Blue Shield)</td>
<td>987.84</td>
<td>82.32</td>
</tr>
<tr>
<td>Estimated Net Benefits</td>
<td>15,008.16</td>
<td>1,250.68</td>
</tr>
</tbody>
</table>

Please be advised; this is an estimate based on the information you provided. Also, because various discounting techniques are used, the column amounts may not sum to the column total. Finally, this is a pre-tax estimate, no Federal, State or Local taxes have been included in this estimate.
Case History

Case History is a history of actions taken on the case. Every evening the case is checked into the database. If a case has not been checked-in, it is automatically checked-in nightly.
Case Alerts appear as the information for the retirement estimate is entered into the calculator. This does not include any errors that may occur during an estimate calculation.

Post 56 Military Deposit

To compute a Post 56 military deposit:

1. Point and click on Post 56 Military.
2. Enter the date first covered under CSRS or FERS. If there is a period of intervening military service, enter the date first covered after the period of military service.
3. Enter the type of service:
   - CSRS
   - FERS
4. Enter the date the military service began.
5. Enter the date the military service ended.
6. Enter the last year in which interest is due.

Note: If the last year of interest is beyond the current year, enter an assumed future interest rate in the Future Interest Rate field.
Post 56 Military Deposit

(Continued)

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TC Summary
Estimate
Case History
Case Alerts
Post 56 Military (Stop)
SSA Website
TSP Website
Change Password
Select Environment

Post 56 Military for John Doe

Post 56 Military Information
- Date first covered under CSRS or FERS: 10/23/1982
- Earnings Amount: 2,500
- Service Type: FERS
- Date military service began: 10/21/1972
- Date military service ended: 10/22/1974
- Last year of interest: 2004
- Future interest rate: Enter the future interest rate if you want to assume a rate other than 2.000%

Required Fields
Save and Calculate
Print
Your information has been saved.

Military Deposit Worksheet

Employee: John Doe
First hired under CSRS/FERS: 10/23/1985
Interest Accrual Date (IAD): 10/23/1988
Military Service: 10/21/1972 to 10/22/1974
Amount of Earnings: $2,500.00
Amount of Deposit: $75.00 (3%)
Interest Accrued: $157.70
Total Due: $232.70

The year by year accumulated interest is as follows:

<table>
<thead>
<tr>
<th>IAD</th>
<th>Deposit Amount</th>
<th>Interest</th>
<th>Interest Rate</th>
<th>Total Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/23/1988</td>
<td>$75.00</td>
<td>$6.37</td>
<td>8.493%</td>
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<tr>
<td>10/23/1989</td>
<td>$81.37</td>
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<tr>
<td>10/23/1990</td>
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<tr>
<td>10/23/1991</td>
<td>$96.50</td>
<td>$8.35</td>
<td>8.849%</td>
<td>$104.85</td>
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<tr>
<td>10/23/1992</td>
<td>$104.85</td>
<td>$8.62</td>
<td>8.293%</td>
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</tr>
<tr>
<td>10/23/1993</td>
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<tr>
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<td>6.415%</td>
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<tr>
<td>10/23/1995</td>
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<td>6.858%</td>
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<tr>
<td>10/23/1996</td>
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<td>$9.55</td>
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<td>6.875%</td>
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<td>10/23/1999</td>
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<tr>
<td>10/23/2000</td>
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<td>5.281%</td>
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<td>$11.49</td>
<td>5.665%</td>
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<tr>
<td>10/23/2003</td>
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<td>$10.84</td>
<td>5.094%</td>
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<tr>
<td>10/23/2004</td>
<td>$223.65</td>
<td>$9.14</td>
<td>4.088%</td>
<td>$232.70</td>
</tr>
</tbody>
</table>

When the initial employment date is before October 1, 1982, the IAD is always October 1, 1982. When the initial employment date is after October 1, 1982, the initial IAD is three years from the date of first employment. If the IAD is December 31, the worksheet automatically defaults to January 1 of the next year.
SSA Website To go to Social Security Administration’s Benefits Calculators, point and click on SSA Website on the Main Menu.

TSP Website To go to the Thrift Savings Plan website, point and click on TSP Website on the Main Menu.

Check-In Case The Check-In Case command on the Main Menu permits the user to return the case to the database. This will allow another user within the agency to retrieve that case at their PC in the same way.

*Note:* Cases are automatically checked-in every evening.

Help Function The RBE is equipped with an online user guide in Adobe Acrobat PDF format. It is located at the bottom of the screens. To access the user guide, point and click on the FACES User Guide link.

![FACES User Guide](image)

Change Password If you are logging in with a temporary password, you must change your password.

*Note:* Users are required to change their password every 60 days.

Point and click on Change Password on the Main Menu. The Change Password screen will appear.
Change Password (Continued)

- Enter your old or temporary password in the field labeled Old Password.
- Enter your new password in the field labeled New Password. The new password:
  - Must be 8 to 30 characters in length
  - Must not contain your user ID or name.
  - Must contain 3 of the 4 following:
    - At least one upper case letter.
    - At least one lower case letter.
    - At least one number.
    - At least one special character (i.e. -!@#$%^&*()_+)

  Sample Password: BigApple1

- To confirm your new password, enter it again in the field labeled Confirm New Password.
- Point and Click on the Change Password button.
- To confirm that your password was changed, the following message will appear.

Support Contacts

- Retirement Estimator Website: https://apps.opm.gov/faces
- Login ID and Password Support: FACES Service Desk, (202) 606-8172
- General Questions or Comments: email us at FACES@opm.gov

Obtaining a Login ID and Password for New Trainees

In order to set up a new trainee you must do the following steps:

- Have the trainee complete and sign a User Access Form.
- The trainee’s supervisor must sign Box 8 and the Agency Benefits Officer must sign Box 9 as authorized officials on the same form.
- Fax a complete application to FACES Support Staff at (202) 606-2339.
- Keep the original copy in a file at your agency.

Obtaining a Login ID and Password for New Trainees (Continued)

- Within 2 days you and the applicant will receive a permanent login ID and a temporary password so that you can begin your training.
Appendix – How to Code

Pre and Post 10-01-82 CSRS deposits are treated as follows:

1. Non-deduction service performed before October 1, 1982, for which no deposit has been made is used in the time base and may be used to compute the average salary if it falls within the high-3 period; however, the annual annuity is reduced by 10% of the amount due as a deposit.

2. Non-deduction service performed after September 30, 1982, for which no deposit has been made is not used in the time base, but is used to compute the average salary if it falls within the high-3 period.

Any time a period of non-deduction service begins before 10/1/82 and ends after 9/30/82, the coding must include a 10/1/82 line in order for the service to be properly credited. If this line is omitted, the FACES will automatically add it.

Work History

- Hired 9/17/1977, on a Temporary Appointment at $2.34 per hour.
- Received a Pay Adjustment on 7/1/1978 to $2.42 per hour.
- Separated on 1/16/1979.
- Rehired 2/1/1981 on an Indefinite Appointment at $4,900 per annum.
- Received a Pay Adjustment on 7/8/1981 to $5,500.
- Received a Pay Change on 6/7/1983 to $2.66 per hour.
- Received a Pay Adjustment on 6/6/1984 to $2.70 per hour.

Coding

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<th>Service Code</th>
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<th>Multiplier</th>
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<td>CSRS</td>
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<td>3: Hourly</td>
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</tr>
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</tr>
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<td>1/23/1985</td>
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</tr>
<tr>
<td>*</td>
<td></td>
<td>Civilian Covered Service</td>
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<td></td>
</tr>
</tbody>
</table>

Remember to add one day to any separation or retirement date.
FERS Deposit service is treated as follows:

1. Non-deduction service performed before January 1, 1989, for which no deposit has been made cannot be credited for any purpose, including title to an annuity. This includes service performed under CSRS rules which is now being credited under FERS computational rules.

2. Non-deduction service performed after December 31, 1988, cannot be credited for any purpose and deposit cannot be made to cover it with the exception of Peace Corps/VISTA service, U.S. Senate Child Care Center Worker service and Foreign Service.

3. Service for which an individual has received a refund after becoming covered by FERS is not creditable for any purpose and the refund cannot be re-deposited unless later employed under FERS on or after 10/28/2009.

4. Civilian service performed before FERS coverage begins which is subject to both CSRS deductions (generally at 1.3%) and social security deductions (CSRS/SS Offset service) is creditable under FERS computational rules. However, the 1.3% deposit must be paid if deductions were made and later refunded. (If refund was made after FERS election, deposit cannot be made unless later employed under FERS on or after 10/28/2009.)

**Work History**

- Hired on 9/17/1977 on a Temporary Appointment at $2.34 per hour.
- Received a Pay Adjustment on 7/18/1978 of $2.42 per hour.
- Separated on 1/15/1979.
- Rehired on 2/1/1984 on a Temporary Appointment at $7.60 per hour.
- Received a Pay Adjustment on 2/2/1985 of $8.38 per hour.

**Coding:**

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<td></td>
<td></td>
</tr>
</tbody>
</table>

*Remember to add one day to any separation or retirement date.*
*Your information has been saved.*
Refunded Service in a CSRS Component Case

Pre and post 10-01-90 refunded service in a CSRS component is treated as follows:

1. Refunded CSRS service ending before October 1, 1990 will be allowed for the length of refunded service but the annuity will be actuarially reduced by an amount equal to the reduction for an alternative form of annuity lump sum in the amount of the redeposit. The reduction will be computed using the same actuarial factors used to determine the alternative annuity reductions.

2. Refunded CSRS service ending after September 30, 1990 must be redeposited in order to receive credit for the service in the annuity computation.

Work History

- Hired 7/14/1983, with CSRS coverage.
- Separated 8/24/1989
- Received a refund of all retirement deductions on 10/10/1989, totaling $5,000.
- Separated 10/30/1990
- Received a refund of all retirement deductions on 12/19/1990, totaling $550.
- Rehired 6/16/1992, with CSRS Offset coverage.
- Transferred to FERS 1/1/1993

Coding:

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```
Refunded CSRS Service

Creditable as FERS

CSRS service refunded prior to FERS coverage, when a CSRS component is not payable, is treated as follows – as long as person was under FERS on or after 10/28/2009:

Work History

- Hired 04/15/1972, under a CSRS career conditional appointment.
- Separated 08/05/1976, and withdrew retirement contributions of $750, which was paid on 09/15/1976.
- Rehired under a career appointment 08/14/1989 and automatically covered by FERS retirement contributions.
- Retired 5/31/2002

Coding: (Even though the refunded service was CSRS, code the start of the appointment as CSRS Offset, as well as the refund line)

Military Service

(Catch 62 and Paid)

CSRS Military Service

- A CSRS employee or a FERS employee with military service in a CSRS component:
  - Who was first employed under CSRS before 10/1/82 can receive credit for post-56 military service without making the deposit, potentially undergoing an annuity reduction for the post-1956 military service at age 62.
  - Who was first employed in a position subject to CSRS on or after 10/1/82, receives credit for post-1956 military service only after making a deposit to the employing agency a sum equal to 7 percent of the military basic pay, plus interest.

FERS Military Service

- A FERS employee may receive credit for post-56 military service under FERS rules only if the employee deposits with the employing agency as sum equal to 3 percent of the military basic pay, plus interest.
Military Service (Catch 62 and Paid) (Continued)

**Catch 62 – CSRS Unpaid Military Deposit**

**Work History:**
- Military Service 10/2/1975 to 10/1/1977 – Unpaid Deposit
- Separated 5/31/1980
- Rehired 8/23/1982 with CSRS coverage.
- Retired 12/31/2002

**Coding:**

<table>
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<th>Service Code</th>
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</tbody>
</table>

Remember to add one day to any separation or retirement date. Your information has been saved.

**Paid Military Deposit**

**Work History:**
- Military Service 10/2/1975 to 10/1/1977 – Paid Deposit
- Separated 5/31/1980
- Rehired 8/23/1987 with FERS coverage.
- Retired 12/31/2002

**Coding:**

<table>
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<tr>
<th>Add, Update or Delete Existing Information</th>
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</tbody>
</table>

Remember to add one day to any separation or retirement date. Your information has been saved.
### Covered Service

#### CSRS Covered Service
- Individuals covered under CSRS pay CSRS employee deductions. Unless they are covered by CSRS Offset, they are excluded from OASDI taxes of Social Security.

#### CSRS Offset
- Individuals covered under CSRS Offset pay OASDI taxes and a reduced CSRS contribution. CSRS retirement and survivor benefits are offset by the value of the offset service in their Social Security benefits.

#### FERS Covered Service
- Individuals covered under FERS pay Social Security taxes and FERS basic benefit deductions.

### Work History:
- Separated 9/30/1977
- Rehired 7/7/1987, with CSRS Offset coverage.
- Elected FERS 1/1/1988
- Retired 12/31/2002

### Coding:

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<td>Retirement</td>
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</table>

Remember to add one day to any separation or retirement date. Your information has been saved.
```
FERS Part-time Case

When an employee retires under FERS without a CSRS component and has part-time service, all periods of service are used in determining the FERS proration factor, including service before April 7, 1986.

Work History:

- Separated 8/11/1980
- Automatically covered under FERS 1/1/1987 – Worked 24 hrs/week
- Schedule Change 1/3/1989 – Worked 32 hrs/week
- Schedule Change 7/15/1993 – Worked 40 hrs/week
- Schedule Change 8/24/1998 – Worked 32 hrs/week
- Schedule Change 10/26/2000 – Worked 40 hrs/week
- Retired 12/31/2002

Note: In a FERS Part Time case with no CSRS component, enter information in the part time are for all service – even full time periods.

Coding:

FERS Part-time with a CSRS Component

When an employee retires under FERS and the FERS annuity includes a CSRS annuity component, and the employee performed part-time service credited in the FERS component, and/or part-time service performed after April 6, 1986, credited in the CSRS component:

The CSRS annuity component of a CSRS employee who has any part-time service on or after April 7, 1986, is the sum of two separate computations:

- A pre-April 7, 1986, basic annuity, using the employee’s total creditable service through April 6, 1986 (plus unused sick leave as of the date of the employee’s separation); and
FERS Part-time with a CSRS Component (Continued)

- A post-April 6, 1986, basic annuity, using the employee’s service from April 7, 1986, through the date of separation, and leftover days from the length of service used to compute the pre-April 7, 1986, basic annuity. The result of this computation is prorated to reflect the difference between full-time and part-time service.

The FERS annuity component is computed using all periods of FERS service to determine the FERS proration factor, including service before April 7, 1986.

Work History:

- Hired 8/18/1965 Career – Worked 40 hrs/week
- Schedule Change 3/12/1970 – Worked 24 hrs/week
- Schedule Change 9/21/1970 – Worked 40 hrs/week
- Schedule Change 7/25/1988 – Worked 32 hrs/week
- Separated 4/6/1990
- Rehired CSRS Offset 3/15/1992 – Worked 40 hrs/week
- Elected FERS 8/15/1992
- Schedule Change 7/31/1995 – Worked 32 hrs/week
- Schedule Change 10/26/1997 – Worked 24 hrs/week
- Schedule Change 5/9/1999 – Worked 40 hrs/week
- Retired 12/31/2002

Note: In a CSRS Part Time case or a FERS Part Time case with a CSRS component, enter Part Time Multiplier and Tour of Duty information beginning on or after April 7, 1986.

Coding:

Separations Anytime an employee resigns from service the resignation is coded as a Separation. Remember to add a day to the separation date.
Retirements

A Final separation is coded as Retirement. Remember to add a day to the retirement date.

Deceased Employee

The date of death for Deceased Employees is coded with a retirement code of “D” Death. Remember to add a day to the date of death.
When coding a Deceased Employee case, enter the employee’s final salary in the BEDB Final Salary. FACES will compare the final salary with the average salary and use the higher of the two in the computation of the Basic Employee Death Benefit.