

Appendix C – ERR Example for FERS Election

The FERS election business examples are intended to depict realistic employee scenarios to demonstrate the type of information to provide for a FERS election, the relationships between data elements, and how repeating fields can be used. The examples only reflect a subset of the retirement data elements that may be provided when an employee elects to transfer to FERS, as applicable to the scenario.

There are three FERS Election examples. In the first example (“FERS_Except” tab), an employee returns to work on September 27, 2009 under a temporary appointment subject to FICA coverage, converts to an excepted appointment subject to CSRS Offset on September 26, 2010, and then submits a belated election to transfer to FERS on September 22, 2011. The Agency accepts the belated FERS election because it was due to circumstances beyond the employee's control and processes a change in retirement plan action effective September 25, 2011. The employee had two previous periods of Federal Service: from October 3, 1983 to April 21, 2004 under CSRS, and from April 29, 2005 to June 27, 2008 under CSRS Offset.

The second example (“FERS_Term” tab) is similar to the first example, except instead of converting to an excepted appointment, the employee converts to a term appointment subject to FICA coverage on September 26, 2010. All other details are the same.

The third example (“FERS_1PP” tab) is similar to the first example, except instead of making a belated FERS election, the employee immediately elects to transfer to FERS. The change in retirement plan action is processed on October 10, 2010.

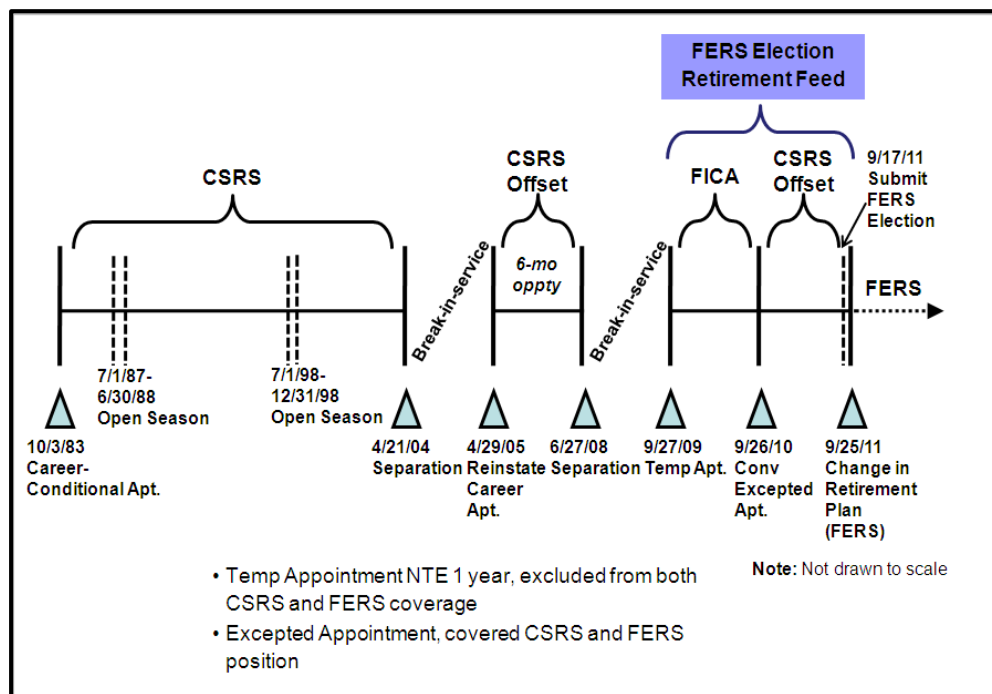


Figure 6: Timeline for FERS Election Example #1

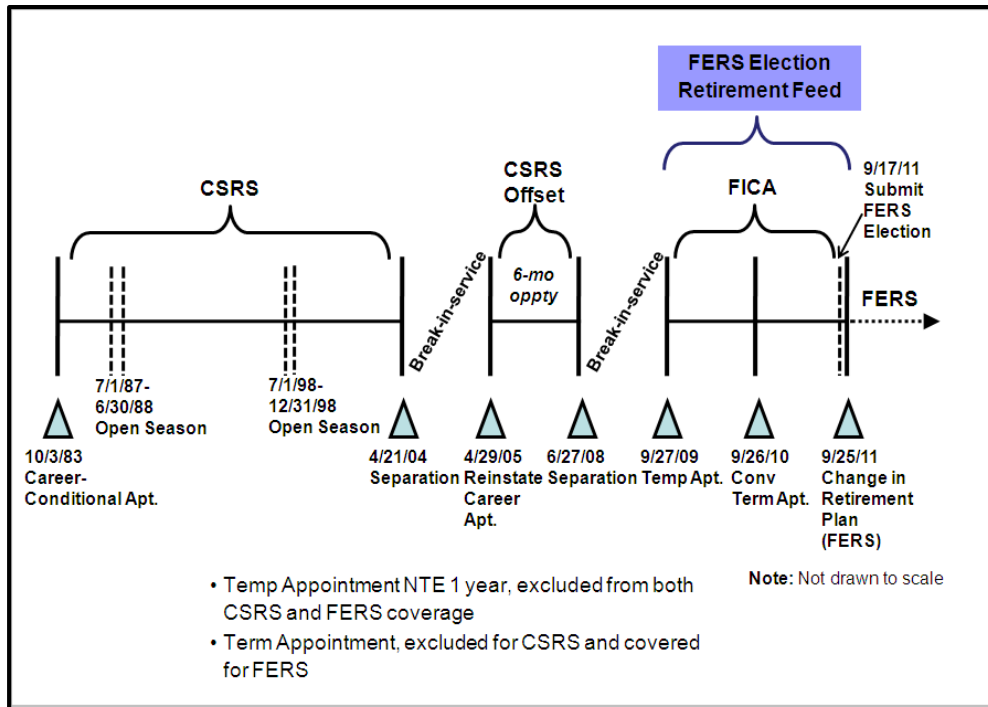


Figure 7: Timeline for FERS Election Example #2

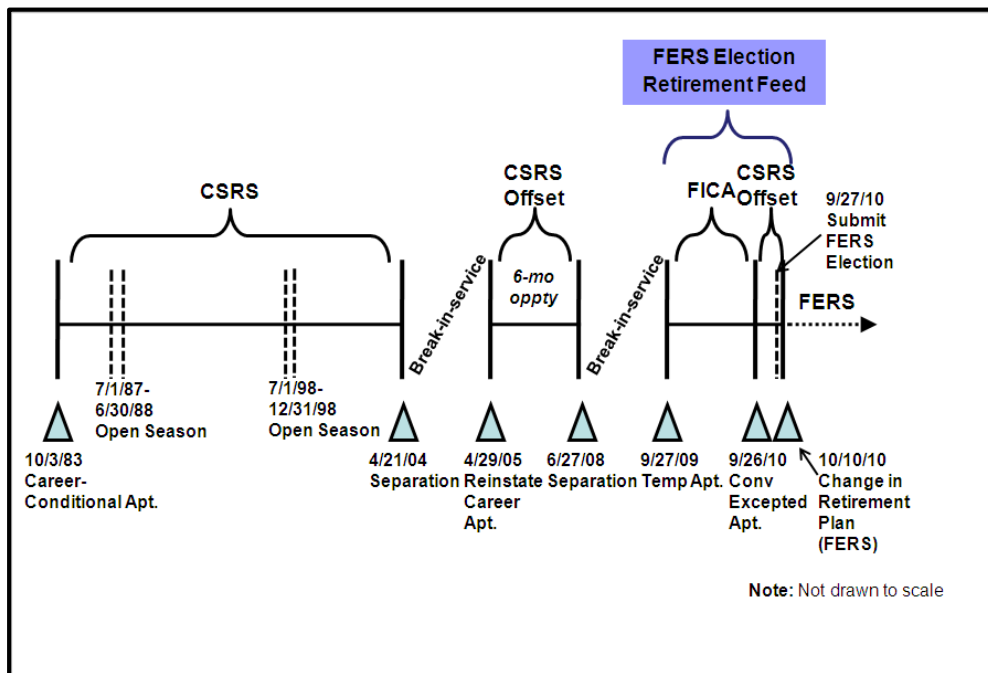


Figure 8: Timeline for FERS Election Example #3

The examples are provided in Excel and XML.

The Excel version can be found using the following link:

<http://www.opm.gov/policy-data-oversight/data-analysis-documentation/enterprise-human-resources-integration/retirement-reporting/fers-election-example.xls>

The XML version can be found using the following link:

<http://www.opm.gov/policy-data-oversight/data-analysis-documentation/enterprise-human-resources-integration/retirement-reporting/fers-election-example-1.xml>