

CD10-OWI-016

REVISION A

Effective Date: July 12, 2000

ORGANIZATIONAL WORK INSTRUCTION

CD10

RETIREMENT PROCESSING

APPROVING
AUTHORITY

<u>NAME</u>	<u>TITLE</u>	<u>ORG</u>	<u>DATE</u>
Danny R. Hightower	Manager	CD10	07/12/00

CHECK THE MASTER LIST—
VERIFY THAT THIS IS THE CORRECT VERSION BEFORE USE

Marshall Space Flight Center Organizational Work Instruction CD10		
Retirement Processing	CD10-OWI-016	Revision A
	Date: 07/12/00	Page 2 of 5

DOCUMENT HISTORY LOG

Status (Baseline/ Revision/ Canceled)	Document Revision	Effective Date	Description
Baseline	N/A	09/30/99	Baseline
Revision	A	07/12/00	Records paragraph revised and expanded
		05/28/03	Document Review
		09/9/03	Document Review

Marshall Space Flight Center Organizational Work Instruction CD10		
Retirement Processing	CD10-OWI-016	Revision A
	Date: 07/12/00	Page 3 of 5

1. PURPOSE

The purpose of this instruction is to document the procedures followed by the Human Resources Department in processing retirement applications.

2. APPLICABILITY

The procedure applies to the processing of all MSFC employee retirement applications.

3. APPLICABLE DOCUMENTS

The Civil Service Retirement System (CSRS) and Federal Employees Retirement System (FERS) Handbook for Personnel and Payroll Offices.

NPG 1441.1 NASA Records Retention Schedules

4. DEFINITIONS AND ACRONYMS

OPF - Official Personnel Folder

OPM - Office of Personnel Management; Federal Agency with responsibility for regulating all aspects of Federal personnel programs

5. INSTRUCTIONS

The guidelines established in the referenced "Applicable Documents" (above) will be adhered to in all matters related to Retirement Operations.

The Employee Relations Specialist (Retirement Coordinator) obtains the Annuity Estimate from either the Retirement Annuity System or the GRB, Inc. program.

The information is relayed to the requesting employee along with explanations, if necessary. If counseling session is requested, an appointment time is designated and the Retirement Coordinator counsels the potential retiring employee with information regarding his

Marshall Space Flight Center Organizational Work Instruction		
CD10		
Retirement Processing	CD10-OWI-016	Revision A
	Date: 07/12/00	Page 4 of 5

retirement system, insurance, taxes, payment schedule, as well as advise regarding the receipt schedule for any correspondence from the Office of Personnel Management. Retirement packages which contain the SF2801 or SF3107 are furnished the employee upon notification of intent to retire.

The completed retirement forms are then submitted to the Retirement Coordinator. The Retirement Coordinator reviews the package for accuracy and completeness and required documentation. The Retirement Coordinator prepares the SF52, routing sheet, and the annuity estimate, and routes the package to the Administrative Services Office within the Human Resources Department for processing.

When the Utility Copy of the Notification of Personnel Action (SF50) is received by the Retirement Coordinator from the Administrative Services Office, it is attached to the retirement package copy and filed.

6. NOTES

None

7. SAFETY PRECAUTIONS AND WARNING NOTES

None

8. APPENDICES, DATA, REPORTS, AND FORMS

SF2801
SF3107
SF50
SF52

9. RECORDS

Record Type: Official Personnel Folder (OPF)
Responsible Party: Retirement Coordinator
Location: Human Resources Department
 Building 4200
 Room 334

Marshall Space Flight Center Organizational Work Instruction CD10		
Retirement Processing	CD10-OWI-016	Revision A
	Date: 07/12/00	Page 5 of 5

Records Retention Schedule: Once the retirement is complete and the employee separated from civilian federal service, his/her personnel records are forwarded to OPM for maintenance.

10. TOOLS, EQUIPMENT, AND MATERIALS

None

11. PERSONNEL TRAINING CERTIFICATION

None

12. FLOW DIAGRAM

None