

GOVERNMENT OF THE DISTRICT OF COLUMBIA
D.C. Department of Human Resources

District Personnel Manual Issuance System

E-DPM Instruction No. 26A-11

SUBJECT: Issuance of New Retirement Computation
Annuity Form for Civil Service Retirement

Date: July 10, 2014

This E-DPM instruction may be accessed electronically at www.dchr.dc.gov, by clicking on the "Policies and Procedures" and "Electronic-District Personnel Manual (E-DPM)" links for Chapter(s):
26A

1. Purpose

The purpose of this E-DPM instruction is to inform and distribute to agencies the newly developed retirement computation annuity form developed by the Department of Human Resources (DCHR). The D.C. Standard Form (DCSF) No. 26A-14-01, *Request for Retirement Annuity Computation Form for Civil Service Retirement*, has been developed as the official form to utilize when requesting a Civil Service Retirement System (CSRS) annuity computation from appropriate DCHR staff. The attached DCSF No. 26A-14-01 is to be utilized only by District government employees who are under the CSRS and are within two (2) years of retirement.

For convenience, District government employees may access the DCSF No. 26A-14-01, a retirement package and procedures, and instructions on DCHR's website at <http://dchr.dc.gov/node/237502>.

2. Applicability

The provisions of this E-DPM instruction are applicable to District government employees covered under the Civil Service Retirement System (CSRS) who were first employed by the District government prior to October 1, 1987. Individuals first employed by the District government after September 30, 1987 are covered under the Defined Contribution Pension Plan.

3. Authority

Statutory Authority: D.C. Official Code § 1-626.01 *et seq.* (2012 Repl.)

Regulatory Authority: Chapter 26A of the D.C. personnel regulations, Civil Service Retirement System

Inquiries: Benefits and Retirement Administration, DCHR (202) 442-9700

Distribution: Heads of Department and Agencies, HR Advisors, and District Government Employees

Retain Until Superseded

4. Confidentiality

Information provided on the DCSF No. 26A-14-01 and any documents or proofs provided as attachments to this form will be safeguarded and maintained in a confidential manner.

5. Inquiries

Questions related to the provisions contained in this E-DPM instruction, or retirement issues/concerns may be directed to DCHR's Benefits and Retirement Administration (BRA) by calling (202) 442-7627 (Benefits Line), or via email at dchr.benefits@dc.gov.

6. Effective Date

This E-DPM instruction is effective immediately.



Shawn Y. Stokes
Director

Attachment:

D.C. Standard Form No. 26A-14-01, *Request for Retirement Annuity Computation Form for Civil Service Retirement (Issued 7/2014)*



Request for Retirement Annuity Computation for Civil Service Retirement

You may request a retirement annuity estimate if you are within 2 years of retirement. Please submit only one request in a 12 month period unless there are extenuating circumstances. Requests may include up to 2 retirement dates for comparison purposes. Dates should be at least 12 months apart to see a significant difference in your annuity. Environmental pay and/or shift differential are not included in estimates but will be included by the U.S. Office of Personnel Management in your final annuity computation after you retire. Your estimate will not include deductions for state tax, dental/vision insurance, or long term care insurance.

1 Employee Information: (All information is required)				
Date of Request :				
What is your projected retirement date(s)? (Generally, the best date for CSRS retirement is the 1 st , 2 nd , 3 rd or last day of the month). Enter N/A if this is a request for a disability retirement estimate.				
Last Name:		Suffix (i.e. Sr., Jr., etc.) _____	First Name :	
			Middle Initial:	
Home Address:				
City:		State:	ZIP:	EMPL ID:
SSN:		Date of Birth (MM/DD/YYYY):		Gender:
Home Phone:	Work Phone:	Cell Phone:	Work Email*: (Your annuity computation contains personally identifiable information which must be encrypted. It cannot be sent to a personal email address.)	
Agency:	Position Title:			Series/Grade/Salary:
1. Are you under a special provision? <input type="checkbox"/> Firefighter <input type="checkbox"/> Law Enforcement Officer <input type="checkbox"/> No				
2. What type of retirement annuity computation are you requesting?				
<input type="checkbox"/> Voluntary Retirement (eligible for immediate annuity based on age and length of service)				
<input type="checkbox"/> Disability Retirement (unable to perform duties of position due to medical condition)				
<input type="checkbox"/> Discontinued Service Retirement (based on involuntary separations- RIF, abolishment of position, etc.)				
<input type="checkbox"/> Early-Out (subject to policy and authorization)				
3. Do you want to elect a survivor annuity for your spouse? ? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not Married				
Note: You must elect a survivor annuity for your spouse to be eligible to continue coverage under the Federal Employee Health Benefits (FEHB), unless your spouse is a federal employee with his/her own entitlement to FEHB. The maximum amount of survivor annuity you can elect is 55% of the amount of your annuity. The minimum survivor annuity you can elect is \$1. Your estimate will be computed based on the maximum survivor annuity and you will be provided information about other survivor options.				
2		Service Agency		Total Years of Service
<input type="checkbox"/> DC Government	From:	To:	Years:	Months:
<input type="checkbox"/> Military (Please attach DD214)	From:	To:	Years:	Months:
<input type="checkbox"/> Federal	From:	To:	Years:	Months:
1. Have you ever received a refund for retirement deductions for service claimed above? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please list dates of service for which refunds were made				
2. Have you purchased any additional service toward retirement or made redeposit for any federal service? <input type="checkbox"/> Yes <input type="checkbox"/> No				
If yes, Years: Months: Days: Date of Record : (Attach proof of purchase)				
3		Benefits <input type="checkbox"/> Yes (Health/Life Benefits) Plan Name: <input type="checkbox"/> No		
Signature:				Date:
Send my Computation by: <input type="checkbox"/> Email (fastest) <input type="checkbox"/> Mail				
Mail or Email this form to: DC Department of Human Resources, Benefits and Retirement Administration, 441 4 th St NW, Suite 340N, Washington, DC 20001 Email: DCHR.Benefits@dc.gov				



Civil Service Retirement System (CSRS) for Employees Hired Prior to October 1, 1987

Employees hired by the District of Columbia Government prior to October 1, 1987, are subject to the provisions of the CSRS administered by the U.S. Office of Personnel Management (Chapter 83 of Title 5 of the United States Code).

Under each plan, you may choose to retire when you reach:

Age	Years of Service	Type of Retirement
55	30	Voluntary
60	20	Voluntary
62	5 or More	Voluntary
Any Age	5 or More	Disability
*50	20	Early Out
*Any Age	25	Early Out

*Subject to Authority and Authorization-The pension of an employee who opts for Early Retirement will be reduced by 2 percent for each year the employee is under age 55.

How to Apply for Voluntary Retirement

1. **Complete the retirement package and submit to the Department of Human Resources, Benefits and Retirement Administration 60 days before your retirement.** If you plan to retire on December 31, January 1, January 2, or January 3, you should submit your retirement application as soon as you know you will be retiring because they are the most popular dates to retire. You may withdraw your retirement application at least 10 business days before the effective date of separation, unless your Agency has a valid reason for not allowing you to do so and explains that reason to you.

The retirement package and procedures are available online: [DCHR Retirement: http://dchr.dc.gov/node/237502](http://dchr.dc.gov/node/237502).

If you need to obtain your records of federal service, service credit deposit receipts or proof of military service please do so prior to scheduling an appointment with Department of Human Resources, Benefits and Retirement Administration.

2. Check with Social Security to determine whether you will be eligible for benefits.
3. Notify your supervisor that you plan to retire by providing an official letter of date of retirement and send a copy to the Department of Human Resources, Benefits and Retirement Administration, 441 4th Street, NW, Suite 340N, Washington, DC 20001.
4. Annuity payments are handled by the U.S. Office of Personnel Management. The process can take up to 120 days to receive the initial payment. Applications are typically transmitted to the U.S. Office of Personnel Management within 10 business days of the effective date of retirement.

Questions

If you have questions, please call the Benefits Line at 202-442-7627. Select menu option #1 to speak to a Retirement Specialist Representative (RSR). RSRs are available from 8:00 a.m. to 5:00 p.m., Monday through Friday (except Holidays). You may also email your questions to DCHR.Benefits@dc.gov. Your email must include your full name, pay plan, grade, contact telephone number and the best time to call you.