

Check Personnel Form for Accuracy

SF-50

Keep copies of all documents in your electronic official personnel folder (eOPF) in a folder of your own. If you change agencies, make sure that your personnel records for ALL prior Federal service are transferred to your new agency.

Beneficiary Forms

Update beneficiary forms as needed to change prior designation or to change the **standard order of precedence**

SF 1152

Unpaid Compensation of Deceased Civilian Employee

SF 2823

Federal Employees' Group Life Insurance (FEGLI)

TSP 3

Thrift Savings Plan (TSP)

SF 2808 - CSRS or sf 3102 - FERS

Lump sum payment payable (CSRS or FERS) of retirement contributions, deposits previously paid, and unpaid retirement benefits payable prior to death. This does not affect the right of any person entitled to a survivor annuity.

TSP Matching

TSP 1 Election Form

Use to start, stop, or change your contributions at any time.

TSP Leaflet 34

Learn how to receive agency matching contributions on your TSP savings. For more information, visit the TSP website or contact a benefits specialist at your agency.

TSP Account Management

TSP BK 30

For more information about the TSP and how to manage your account.

Deposits / Redeposits

If you have performed military active duty, temporary or seasonal Federal civilian service, or if you have ever received a refund of CSRS or FERS retirement contributions, you may owe money to the retirement fund. That is called a “deposit.” Your benefits office (HR) can determine how much you may owe and how making this payment will affect your eligibility and the computation of your future retirement benefit. Check on this as soon as possible because interest continuously accrues on unpaid deposit amounts.

Check Federal and State Income Withholding

Review your tax withholdings for State and Federal Income Tax and revise if necessary. Talk with your tax advisor if you received a **large refund** on your Federal or State income taxes OR if you **owed taxes last year**.

Health Savings Accounts (HSA)

If you enroll in a High Deductible Health Plan (HDHP) under certain circumstances an HSA is created for you. This account uses pre-tax dollars to pay qualifying out-of-pocket co-pays and deductibles for medical, dental, and vision expenses. The health plan credits a portion of the premium to this account, and you are also allowed to contribute additional pre-tax dollars, up to the established annual limits. Unused funds roll over to the next year and can be taken with you if your job status changes or if you change health plans.

Federal Flexible Spending Account Program (FSAFEDS)

FSAFEDS accounts provide a way for you to save money on health care and/or child/elder care expenses. When you enroll, you elect an annual amount of your salary to be set aside for the account. This lowers the amount of income tax you pay because the salary you set aside for FSAFEDS is not taxed. When you incur eligible expenses you will receive reimbursement. You may have a Health Care Flexible Spending Accounts (HCFSA) and/or a Dependent Care Flexible Spending Account (DCFSA).