USER GUIDE
RETIREMENT ESTIMATE/PROCESSING

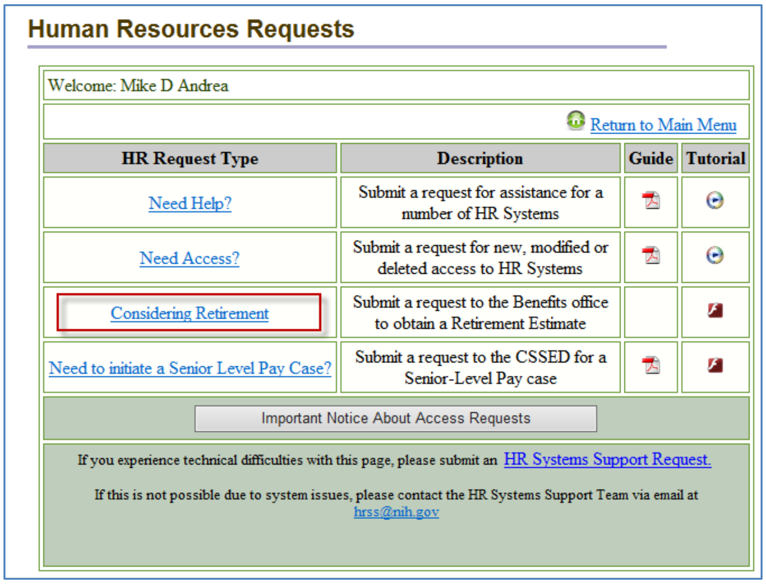
The **Retirement Estimate/Processing** workflow is used to track the processing of requests for retirement estimates and the processing of employee retirement actions.

Last Updated: 11/25/2015

Retirement Estimates

To begin the process, the employee submits a request for a retirement estimate using the web form on the OHR website or the HR Requests Page.

If the employee is unable to submit an estimate request, the Benefits and Payroll Liaison Branch (BPLB) staff has the ability to initiate the request on the employee's behalf.



Human Resources Requests

Welcome: Mike D Andrea

Return to Main Menu

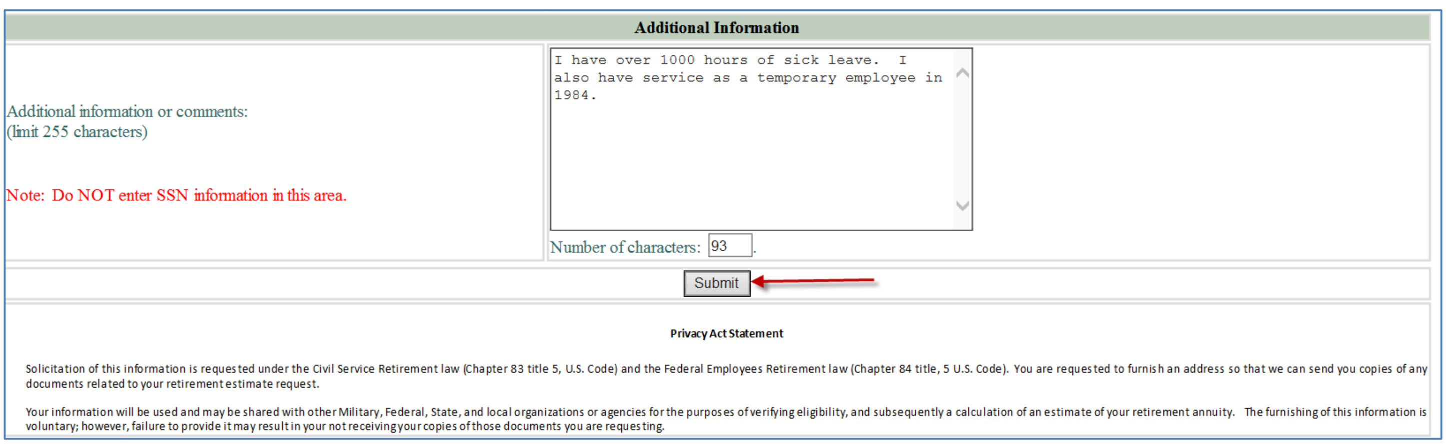
HR Request Type	Description	Guide	Tutorial
Need Help?	Submit a request for assistance for a number of HR Systems		
Need Access?	Submit a request for new, modified or deleted access to HR Systems		
Considering Retirement	Submit a request to the Benefits office to obtain a Retirement Estimate		
Need to initiate a Senior Level Pay Case?	Submit a request to the CSSED for a Senior-Level Pay case		

Important Notice About Access Requests

If you experience technical difficulties with this page, please submit an HR Systems Support Request.

If this is not possible due to system issues, please contact the HR Systems Support Team via email at hrss@nih.gov

Once the employee submits the form, he or she will receive confirmation of receipt and a WiTS number.



Additional Information

Additional information or comments: (limit 255 characters) Note: Do NOT enter SSN information in this area.	I have over 1000 hours of sick leave. I also have service as a temporary employee in 1984. Number of characters: 93.

Submit

Privacy Act Statement

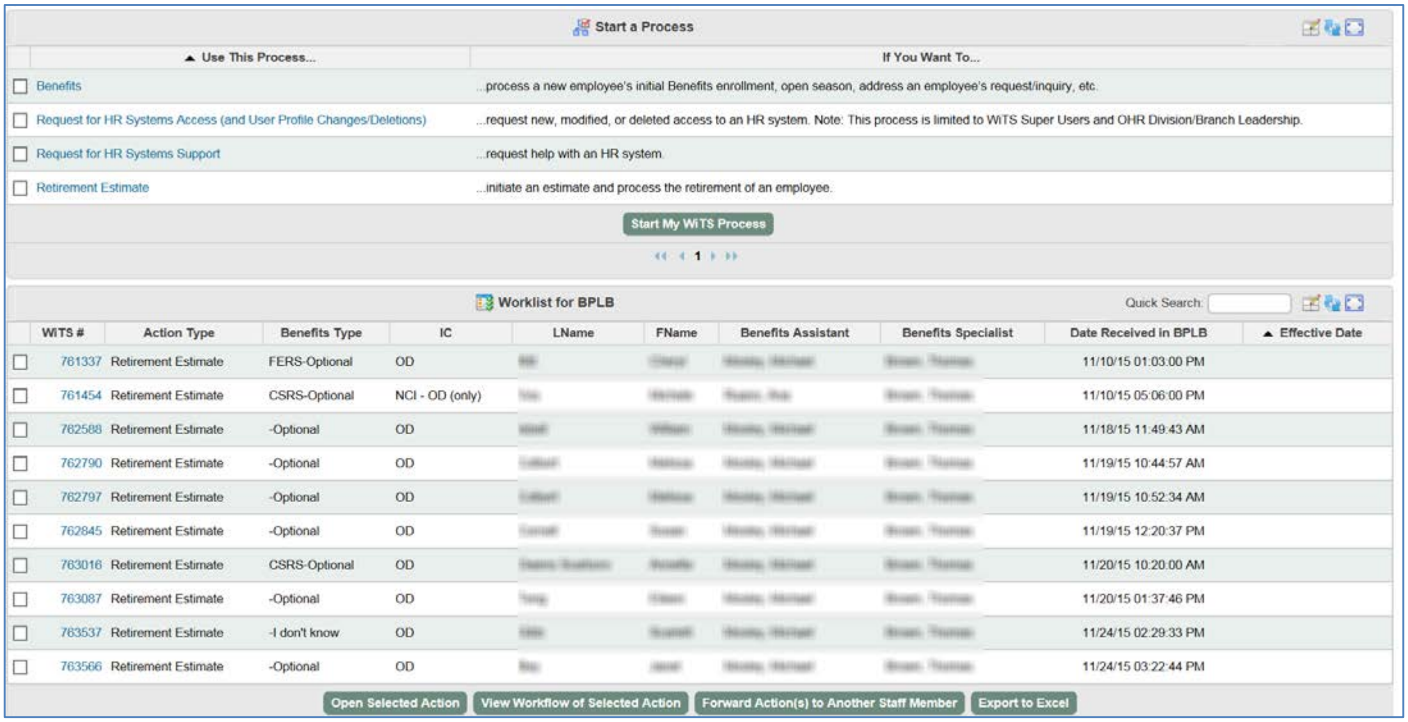
Solicitation of this information is requested under the Civil Service Retirement law (Chapter 83 title 5, U.S. Code) and the Federal Employees Retirement law (Chapter 84 title, 5 U.S. Code). You are requested to furnish an address so that we can send you copies of any documents related to your retirement estimate request.

Your information will be used and may be shared with other Military, Federal, State, and local organizations or agencies for the purposes of verifying eligibility, and subsequently a calculation of an estimate of your retirement annuity. The furnishing of this information is voluntary; however, failure to provide it may result in your not receiving your copies of those documents you are requesting.

Accessing the Estimate

If an employee submits a request, an email is sent to the Specialist assigned to the IC selected on the form. The Retirement Estimate will then appear in the Specialist's worklist.

If an employee does not submit an estimate, you can create one by clicking on 'Retirement Estimate' in the "Start a Process" Bizcove.



Start a Process

Use This Process...	If You Want To...
Benefits	...process a new employee's initial Benefits enrollment, open season, address an employee's request/inquiry, etc.
Request for HR Systems Access (and User Profile Changes/Deletions)	...request new, modified, or deleted access to an HR system. Note: This process is limited to WiTS Super Users and OHR Division/Branch Leadership.
Request for HR Systems Support	...request help with an HR system.
Retirement Estimate	...initiate an estimate and process the retirement of an employee.

Start My WiTS Process

Worklist for BPLB

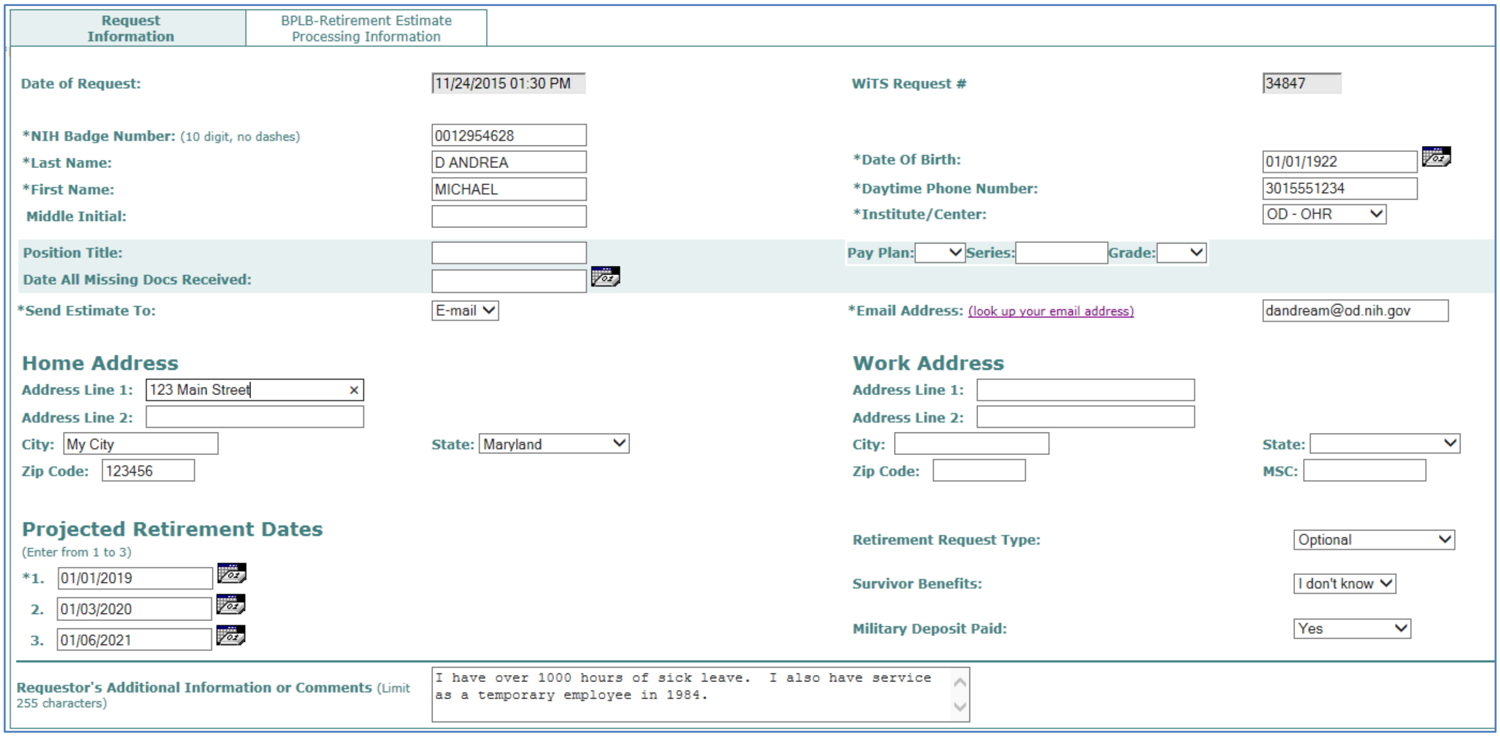
Quick Search:

WiTS #	Action Type	Benefits Type	IC	LName	FName	Benefits Assistant	Benefits Specialist	Date Received in BPLB	Effective Date
761337	Retirement Estimate	FERS-Optional	OD					11/10/15 01:03:00 PM	
761454	Retirement Estimate	CSRS-Optional	NCI - OD (only)					11/10/15 05:06:00 PM	
762588	Retirement Estimate	-Optional	OD					11/18/15 11:49:43 AM	
762790	Retirement Estimate	-Optional	OD					11/19/15 10:44:57 AM	
762797	Retirement Estimate	-Optional	OD					11/19/15 10:52:34 AM	
762845	Retirement Estimate	-Optional	OD					11/19/15 12:20:37 PM	
763016	Retirement Estimate	CSRS-Optional	OD					11/20/15 10:20:00 AM	
763087	Retirement Estimate	-Optional	OD					11/20/15 01:37:46 PM	
763537	Retirement Estimate	-I don't know	OD					11/24/15 02:29:33 PM	
763566	Retirement Estimate	-Optional	OD					11/24/15 03:22:44 PM	

Open Selected Action | View Workflow of Selected Action | Forward Action(s) to Another Staff Member | Export to Excel

Request Information Tab

If the employee submitted an online request, the information entered by the employee on the web form will be populated on the "Request Information" tab. If the employee did not create an estimate, the Specialist will need to complete this information. Use the "look up your email address" hyperlink to search for the employee in NED.



Request Information | BPLB-Retirement Estimate Processing Information

Date of Request:	11/24/2015 01:30 PM	WiTS Request #	34847
*NIH Badge Number: (10 digit, no dashes)	0012954628		
*Last Name:	D ANDREA	*Date Of Birth:	01/01/1922
*First Name:	MICHAEL	*Daytime Phone Number:	3015551234
Middle Initial:		*Institute/Center:	OD - OHR
Position Title:		Pay Plan: Series: Grade:	
Date All Missing Docs Received:			
*Send Estimate To:	E-mail	*Email Address: (look up your email address)	dandream@od.nih.gov

Home Address

Address Line 1:	123 Main Street		
Address Line 2:			
City:	My City	State:	Maryland
Zip Code:	123456		

Work Address

Address Line 1:			
Address Line 2:			
City:		State:	
Zip Code:		MSC:	

Projected Retirement Dates
(Enter from 1 to 3)

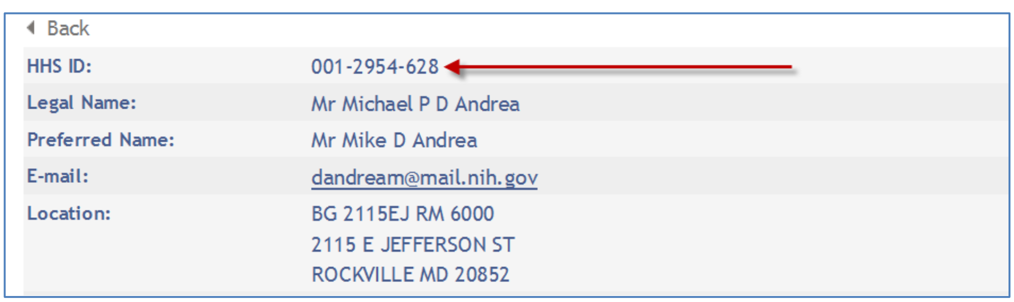
*1.	01/01/2019
2.	01/03/2020
3.	01/06/2021

Retirement Request Type:	Optional
Survivor Benefits:	I don't know
Military Deposit Paid:	Yes

Requestor's Additional Information or Comments (Limit 255 characters): I have over 1000 hours of sick leave. I also have service as a temporary employee in 1984.

WiTS Tip:

- If you are entering the request on behalf of the employee, please ensure the NIH Badge Number (NED ID or HHS ID) is correct (without any dashes). The NIH Badge Number is the unique identifier for the employee.



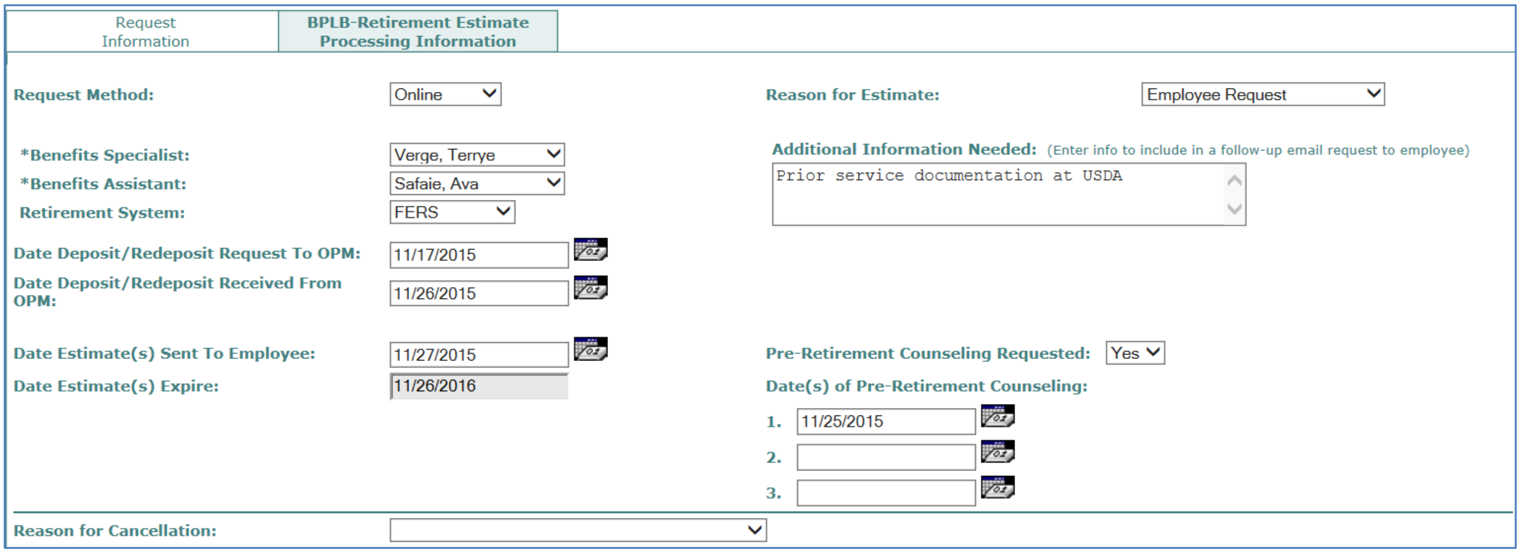
Back

HHS ID:	001-2954-628
Legal Name:	Mr Michael P D Andrea
Preferred Name:	Mr Mike D Andrea
E-mail:	dandream@mail.nih.gov
Location:	BG 2115EJ RM 6000 2115 E JEFFERSON ST ROCKVILLE MD 20852

Last Updated: 11/25/2015

BPLB – Retirement Estimate Processing Information Tab

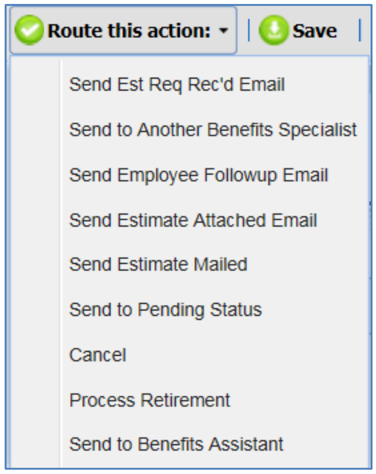
The next tab to be completed is the Retirement Estimate Processing Information tab.



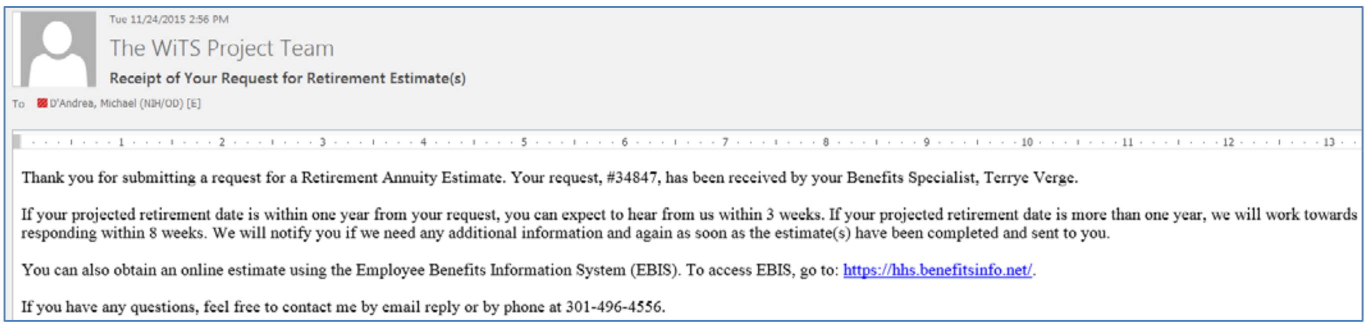
- ***Request Method:*** Indicate the method that the employee used to request the estimate.
- ***Reason for Estimate:*** Indicate the reason for the employee's estimate.
- ***Benefits Specialist:*** Select the Benefits Specialist responsible for the retirement action.
- ***Benefits Assistant:*** Select the Benefits Assistant responsible for the retirement action.
- ***Retirement System:*** Select the employee's retirement system.
- ***Date Deposit/Redeposit Request To OPM:*** If applicable, indicate the date a request was made to OPM for a deposit or redeposit.
- ***Date Deposit/Redeposit Received From OPM:*** If applicable, indicate the date the request was returned from OPM for a deposit or redeposit.
- ***Date Estimate(s) Sent to Employee:*** Indicate the date that the estimate was sent to the employee.
- ***Date Estimate(s) Expire:*** This date is auto-populated from the Date Estimate Sent to Employee field by adding one year. This date represents when the estimate is set to expire and archive in WiTS.
- ***Additional Information Needed:*** Use this field to track any additional information you need to furnish an estimate. *The contents of this email are contained in the Follow Up email to the employee. For additional tracking options, reference the Comments – Internal Discussion section of this guide.*
- ***Pre-Retirement Counseling Requested:*** Indicate if the employee requested any pre-retirement counseling services.
- ***Date(s) of Pre-Retirement Counseling:*** If applicable, indicate the date(s) of any pre-retirement counseling services.
- ***Reason for Cancellation:*** If applicable, indicate the reason for cancelling the retirement action. This field is required, if you select 'Cancel' from the routing menu.

Routing and Communication during the Estimate Process

During the Estimate Process, the Specialist can select the following options from the routing menu. After selecting your option, you will receive a confirmation before the action is taken.



- **Send Estimate Request Received Email:** Sends an email to the employee, from the Benefits Specialist, to notify him/her that the request has been received by the Benefits Specialist.



Tue 11/24/2015 2:56 PM

The WiTS Project Team

Receipt of Your Request for Retirement Estimate(s)

To D'Andrea, Michael (NIH/OD) [E]

Thank you for submitting a request for a Retirement Annuity Estimate. Your request, #34847, has been received by your Benefits Specialist, Terrye Verge.

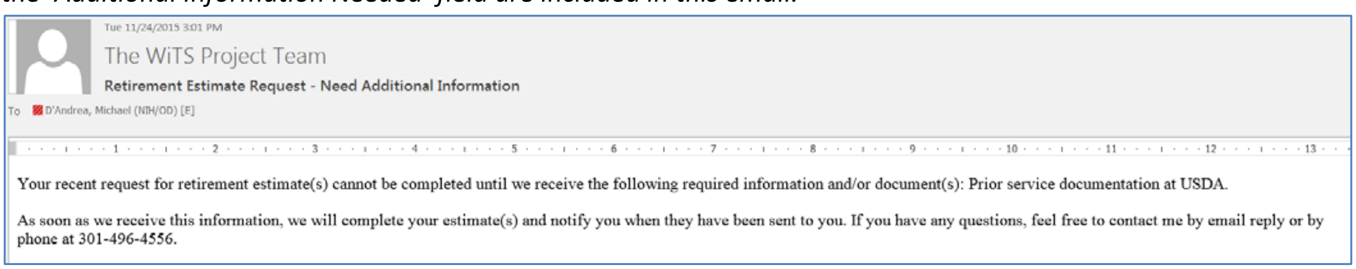
If your projected retirement date is within one year from your request, you can expect to hear from us within 3 weeks. If your projected retirement date is more than one year, we will work towards responding within 8 weeks. We will notify you if we need any additional information and again as soon as the estimate(s) have been completed and sent to you.

You can also obtain an online estimate using the Employee Benefits Information System (EBIS). To access EBIS, go to: https://hhs.benefitsinfo.net/.

If you have any questions, feel free to contact me by email reply or by phone at 301-496-4556.

- **Send to Another Benefits Specialist:** Sends the action to the Benefits Specialist selected on the form.

- **Send Employee Follow up Email:** Sends an email to the employee, from the Benefits Specialist, to notify him/her that the request cannot be completed unless additional information is furnished. *The contents of the 'Additional Information Needed' field are included in this email.*



Tue 11/24/2015 3:01 PM

The WiTS Project Team

Retirement Estimate Request - Need Additional Information

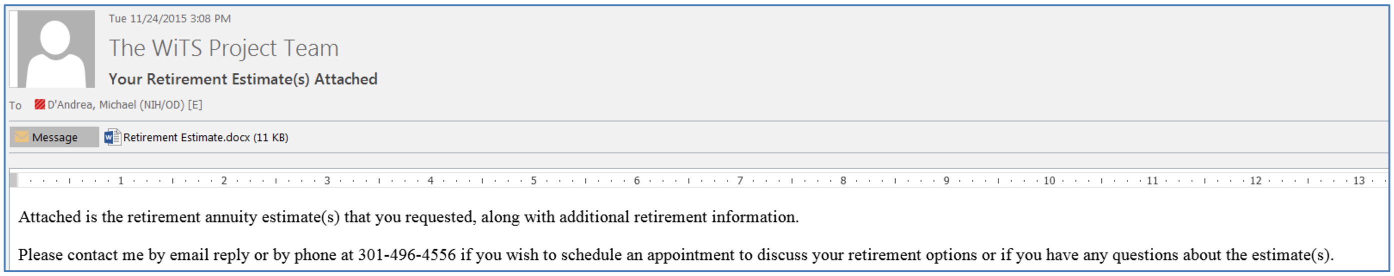
To D'Andrea, Michael (NIH/OD) [E]

Your recent request for retirement estimate(s) cannot be completed until we receive the following required information and/or document(s): Prior service documentation at USDA.

As soon as we receive this information, we will complete your estimate(s) and notify you when they have been sent to you. If you have any questions, feel free to contact me by email reply or by phone at 301-496-4556.

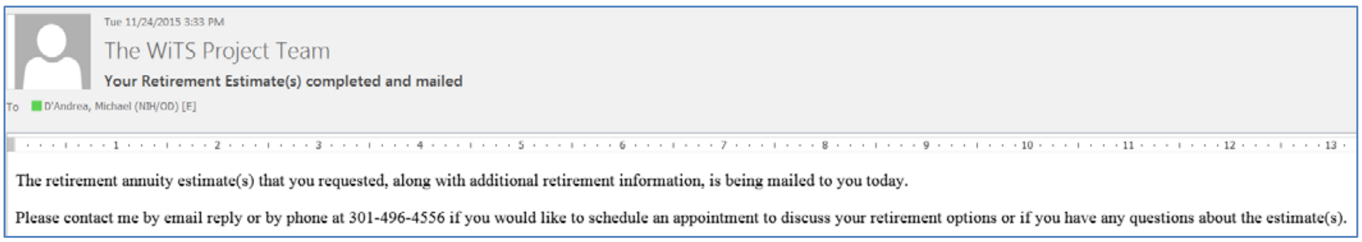
Last Updated: 11/25/2015

- **Send Estimate Attached Email:** Sends an email to the employee, from the Benefits Specialist, notifying him/her that the estimate is complete and is attached to the email. Be sure to attach the estimate to the action before selecting this response.
  - *Once this email is sent, the action will automatically move to a pending status.*



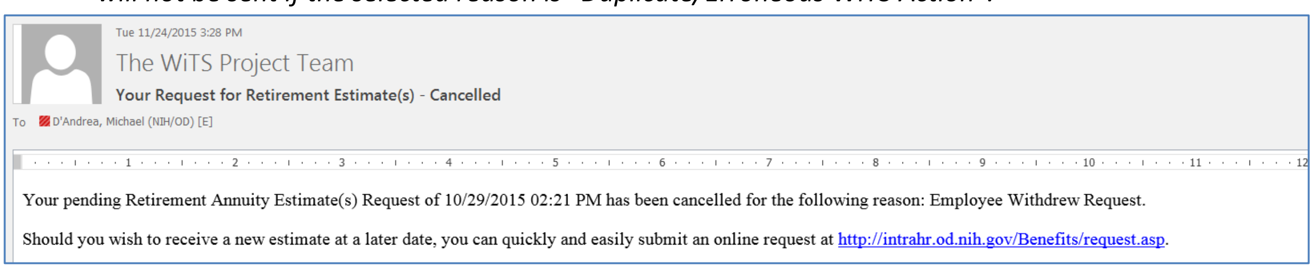
o

- **Send Estimate Mailed:** Sends an email to the employee, from the Benefits Specialist, notifying him/her that the estimate is complete and has been mailed to the employee's work or home address.
  - *Once this email is sent, the action will automatically move to a pending status.*



- **Send to Pending Status:** Puts the action in a pending status and sends it to the BPLB Pending Retirement Actions Bizcove. Before selecting this response, you ***MUST*** complete the "Date Estimate(s) Sent to Employee" field.

- **Cancel:** Sends an email to the employee notifying him/her that the estimate request has been canceled. The action will be automatically moved to Archives. Before sending this email, you must select a "Reason for Cancellation" from the drop-down field at the bottom of the form. *An email will not be sent if the selected reason is "Duplicate/Erroneous WiTS Action".*



- **Process Retirement:** Moves an active or pending estimate to the retirement processing stage. This option is used when an employee is ready to submit their retirement application at the time of estimate.

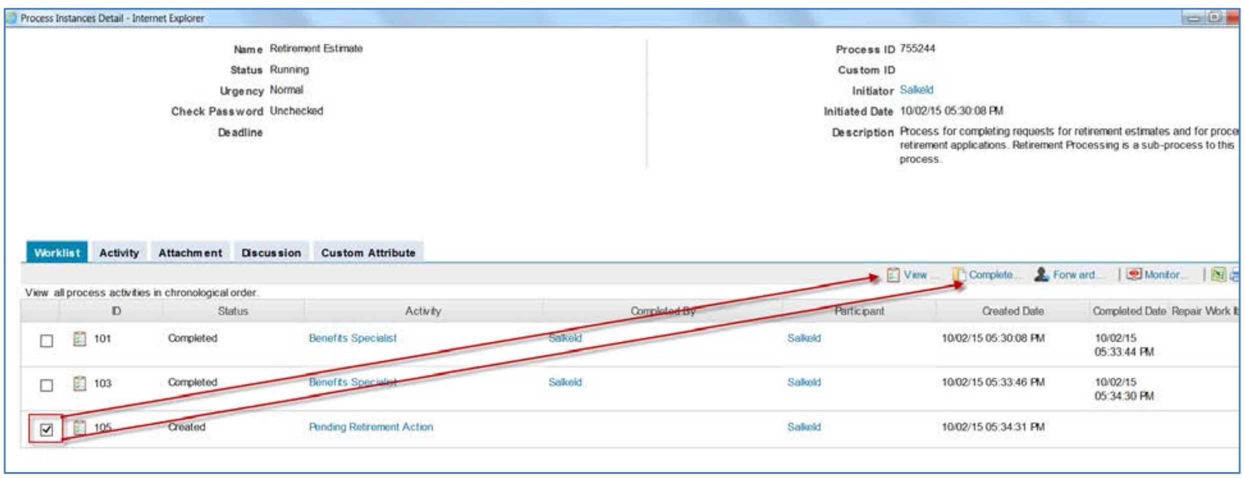
- **Send to Benefits Assistant:** Sends the action to the Benefits Assistant selected on the form.

Pending Actions & Retirement Processing

Pending Retirement actions live in the 'BPLB Pending Retirement Actions' Bizcove. They remain in this Bizcove for one-year after the Date Estimate Sent to Employee. If the retirement processing does not start before this one-year period, the action is automatically archived.

- To begin the retirement process, select the action from the 'BPLB Pending Retirement Actions' Bizcove by clicking on the WiTS #.

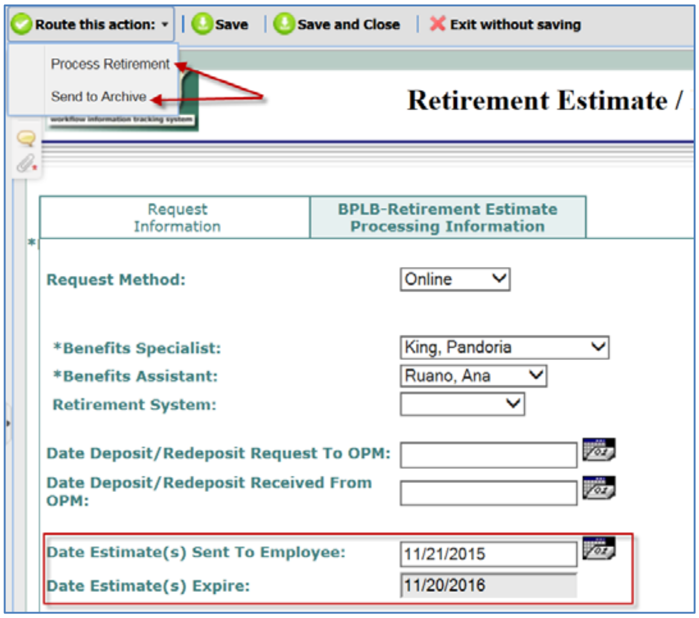
- After clicking on the WiTS number, you will be directed to a process details window.
  - Place a checkmark in the last row and then click 'View' or 'Complete'. *View gives you the ability to see the contents of the action without saving anything. Complete gives you the ability to see and edit the contents of the action.*



- The Benefits Specialist should review the fields on the "Request Information" and "BPLB-Retirement Estimate Processing Information" tab, and make any necessary updates.

Last Updated: 11/25/2015

- While the action is in the pending stage, the Benefits Specialist has the option to force archive the action by selecting, 'Send to Archive' from the routing menu, OR if the employee decides to retire, you can select 'Process Retirement'.
  - *Clicking on 'Process Retirement' will begin the actual retirement process. The action will be routed to the 'BPLB Worklist' of the selected Specialist on the form and to the 'Active Retirement Actions for BPLB' Bizcove.*

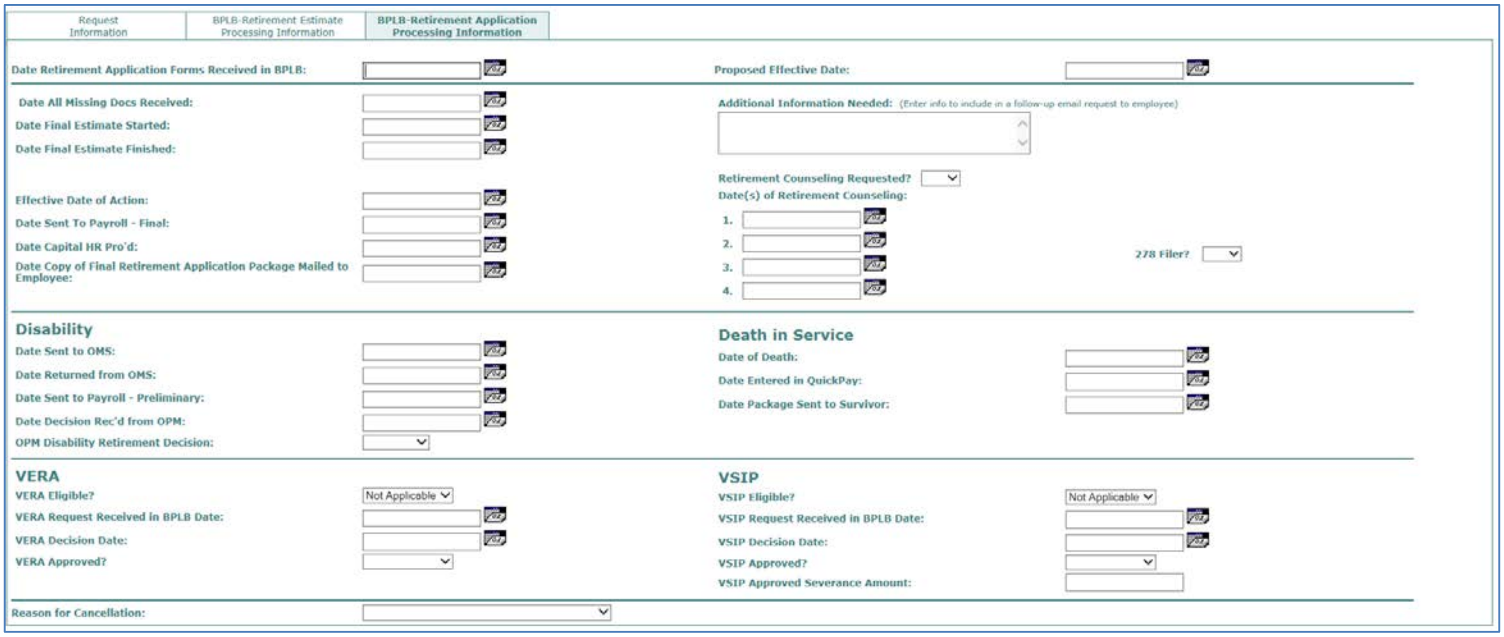


WiTS Tip:

- Once an action is archived, it cannot be reactivated. A new action must be created.

BPLB – Retirement Application Processing Information tab

The next tab to be completed is the Retirement Application Processing Information tab. *This tab is only visible while the action is in the Retirement Processing stage.*



- ***Date Retirement Application Forms Received in BPLB:*** Enter the date the employee's application was received.
- ***Date All Missing Docs Received:*** Enter the date all required documentation to process the retirement was received.
- ***Proposed Retirement Effective Date:*** Enter the date the employee's retirement action will be effective. *This date will auto populate in the "Effective Date of Action" field.*
- ***Additional Information Needed:*** Use this field to track any additional information you need to process the retirement. The contents of this email are contained in the Follow Up email to the employee. For additional tracking options, reference the Comments – Internal Discussion section of this guide.
- ***Date Final Estimate Started:*** Enter the date that the final estimate was started.
- ***Date Final Estimate Finished:*** Enter the date that the final estimate was finished.
- ***Effective Date of Action:*** This field is populated with the date entered in the "Proposed Retirement Effective Date" field or the "Date of Death" field. It can also be manually entered.
- ***Date Sent To Payroll – Final:*** Enter the date the case was sent to payroll.
- ***Date Capital HR Pro'd:*** Enter the date the retirement action was processed in Capital HR.
- ***Date Copy of Final Retirement Application Package Mailed to Employee:*** Enter the date the retirement separation package was mailed to the employee.
- ***Retirement Counseling Requested?:*** Indicate if the employee requested any retirement counseling services.
- ***Date(s) of Retirement Counseling:*** If applicable, enter the dates of the retirement counseling sessions.
- ***278 Filer?****:* Indicate whether or not the employee is retiring from a position that was subject to Public Financial Disclosure (OGE-278) filing. For more information, visit the NIH Ethics website: https://ethics.od.nih.gov/topics/forms278.htm

Last Updated: 11/25/2015

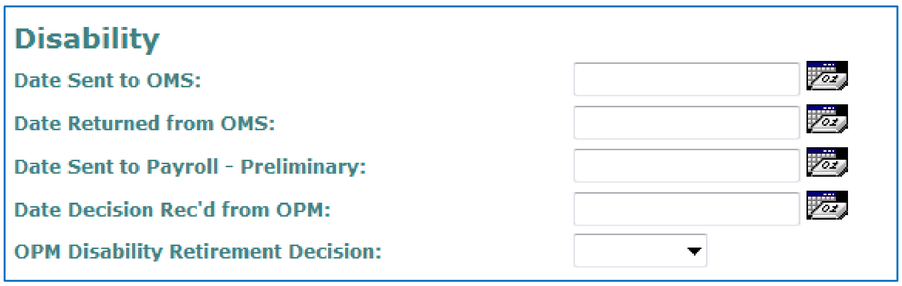
WiTS Tip:

- ➢ If you indicated that the position was subject to 278 filing, the following email will be sent to the NIH Ethics Office with a cc to the Benefits Specialist

Subject: Retirement Action Processed for 278 person/position

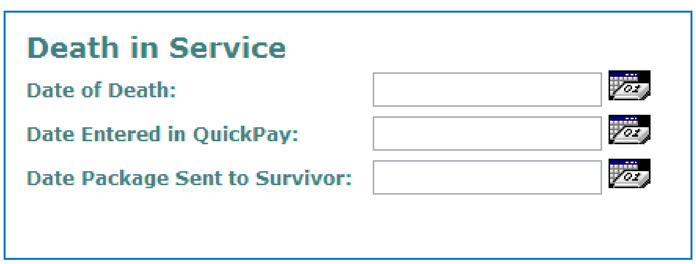
Terrye Verge has retired from the OD - OHR, effective 02/21/2012. This position has been identified as subject to 278. A Recruitment / Appointment action may be initiated in the future to fill the vacant position.

Disability Cases



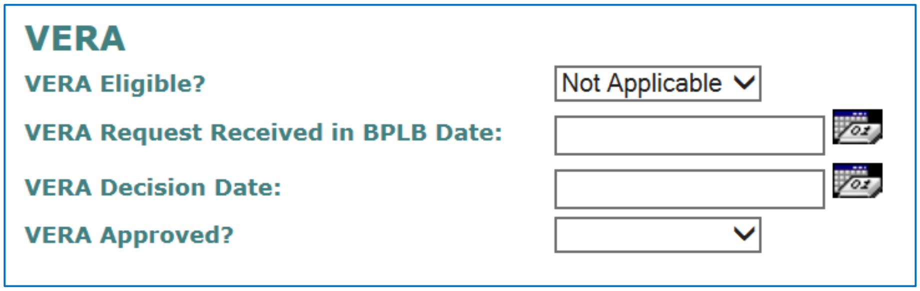
- ***Date Sent to OMS:*** Enter the date the case was sent to NIH, Occupational Medical Services (OMS).
- ***Date Returned From OMS***: Enter the date the case was returned from OMS.
- ***Date Sent to Payroll – Preliminary:*** Enter the date the preliminary case was sent to payroll.
- ***Date Decision Received From OPM:*** Enter the date the decision was received from OPM.
- ***OPM Disability Retirement Decision:*** Select OPM's decision on the retirement application.

Death in Service Cases



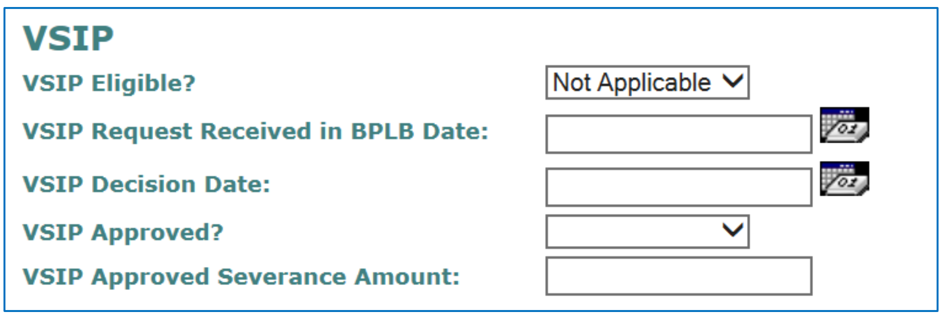
- ***Date of Death:*** Enter the employee's date of death. *This date will auto-populate in the "Effective Date of Action" field.*
- ***Entered in QuickPay***: Enter the date the case was entered in QuickPay.
- ***Date Package Sent to Survivor:*** Enter the date the claims forms were sent to the employee's survivor(s).

Voluntary Early Retirement Authority Cases



- ***VERA Eligible?**:* Indicate whether the employee is eligible for VERA. *This field will default to 'Not Applicable.'*
- ***VERA Request Received in BPLB Date**:* Enter the date that the VERA request was received.
- ***VERA Decision Date***: Enter the date of the VERA decision.
- ***VERA Approved?**:* Indicate whether the VERA request was approved.

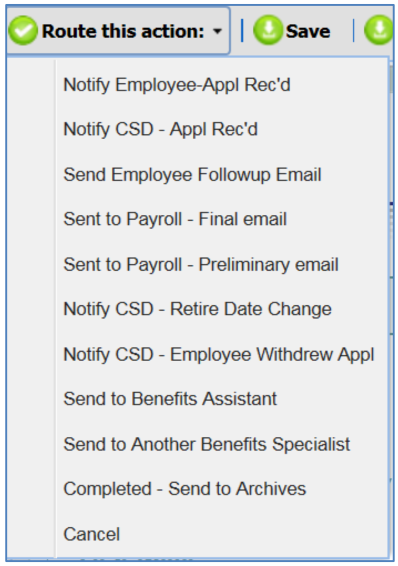
Voluntary Separation Incentive Payment Cases



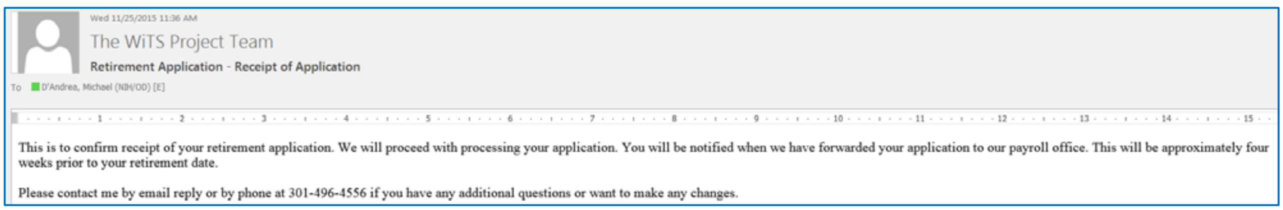
- ***VSIP Eligible?:*** Indicate the employee is eligible for VSIP. *This field will default to 'Not Applicable.'*
- ***VSIP Request Received in BPLB Date:*** Enter the date that the VSIP request was received.
- ***VSIP Decision Date*:** Enter the date of the VSIP decision.
- ***VSIP Approved?***: Indicate whether the VSIP request was approved.
- ***VSIP Approved Severance Amount*:** Enter the approved severance amount if applicable.

Routing and Communication during the Retirement Process

During the Retirement Process, the Specialist can select the following options from the routing menu. After selecting your option, you will receive a confirmation before the action is taken.



- **Notify Employee - Appl Rec'd:** Sends an email to the employee, from the Benefits Specialist, to notify him/her that the application has been received by the Benefits Specialist.

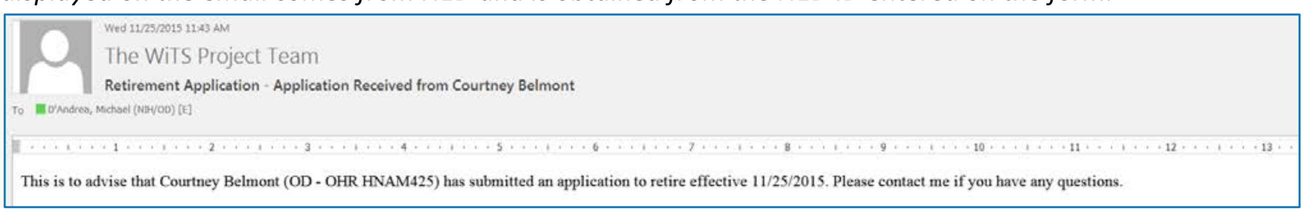


Wed 11/25/2015 11:36 AM
The WiTS Project Team
Retirement Application - Receipt of Application
To D'Andrea, Michael (NIH/OD) [E]

This is to confirm receipt of your retirement application. We will proceed with processing your application. You will be notified when we have forwarded your application to our payroll office. This will be approximately four weeks prior to your retirement date.

Please contact me by email reply or by phone at 301-496-4556 if you have any additional questions or want to make any changes.

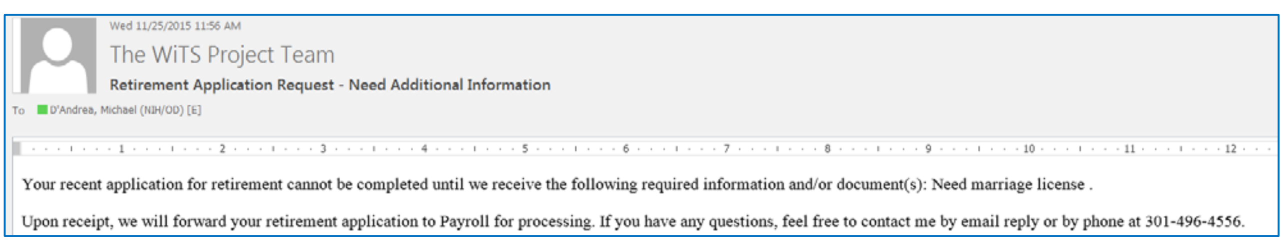
- **Notify CSD - Appl Rec'd:** Sends an email, from the Benefits Specialist, to the CSD Branch Chief(s) associated with the IC selected on the form of the employee's intent to retire. *The admin code displayed on the email comes from NED and is obtained from the NED ID entered on the form.*



Wed 11/25/2015 11:43 AM
The WiTS Project Team
Retirement Application - Application Received from Courtney Belmont
To D'Andrea, Michael (NIH/OD) [E]

This is to advise that Courtney Belmont (OD - OHR HNAM425) has submitted an application to retire effective 11/25/2015. Please contact me if you have any questions.

- **Send Employee Follow-up Email:** Sends an email to the employee, from the Benefits Specialist, to notify him/her that additional information is required to process the retirement. The contents of the 'Additional Information Needed' field are included in the email.

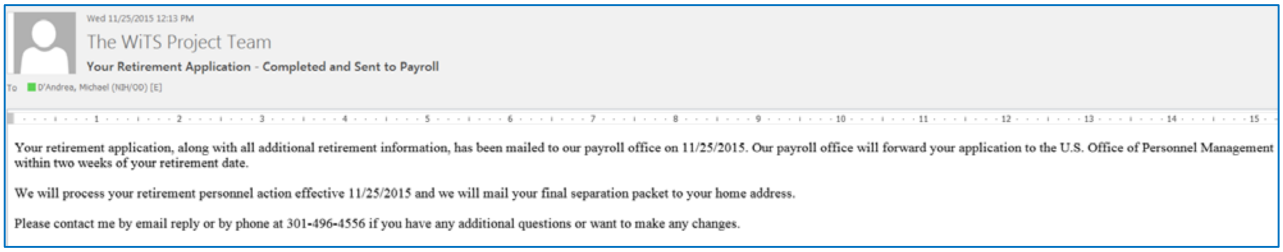


Wed 11/25/2015 11:56 AM
The WiTS Project Team
Retirement Application Request - Need Additional Information
To D'Andrea, Michael (NIH/OD) [E]

Your recent application for retirement cannot be completed until we receive the following required information and/or document(s): Need marriage license .

Upon receipt, we will forward your retirement application to Payroll for processing. If you have any questions, feel free to contact me by email reply or by phone at 301-496-4556.

- **Sent to Payroll - Final Email**: Sends an email to the employee, from the Benefits Specialist, to notify him/her that the application has been completed and forwarded to payroll for further processing. Before sending this email, you must complete the “Date Sent to Payroll-Final” and the “Effective Date of Action” fields.

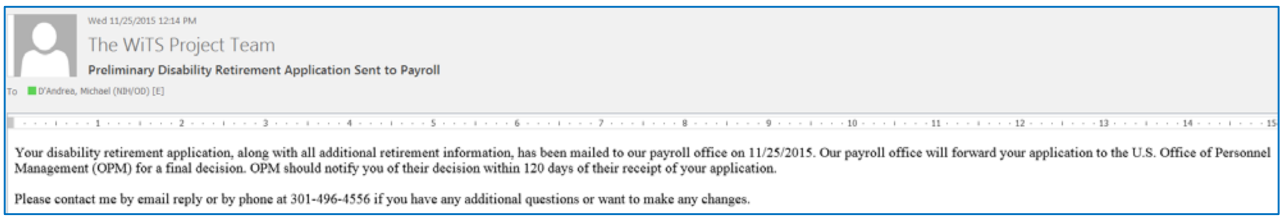

Wed 11/25/2015 12:13 PM
The WiTS Project Team
Your Retirement Application - Completed and Sent to Payroll
To D'Andrea, Michael (NIH/OD) [E]

Your retirement application, along with all additional retirement information, has been mailed to our payroll office on 11/25/2015. Our payroll office will forward your application to the U.S. Office of Personnel Management within two weeks of your retirement date.

We will process your retirement personnel action effective 11/25/2015 and we will mail your final separation packet to your home address.

Please contact me by email reply or by phone at 301-496-4556 if you have any additional questions or want to make any changes.

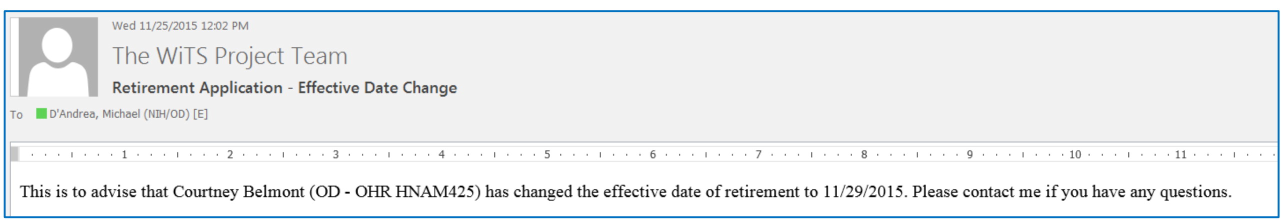
- **Sent to Payroll - Preliminary Email:** Used for disability retirements only, this sends an email, from the Benefits Specialist, to the employee to notify them that the preliminary application has been completed and forwarded to payroll for pre-approval by OPM. Before sending this email, you must complete the “Date Sent to Payroll – Preliminary Disability Case” field.


Wed 11/25/2015 12:14 PM
The WiTS Project Team
Preliminary Disability Retirement Application Sent to Payroll
To D'Andrea, Michael (NIH/OD) [E]

Your disability retirement application, along with all additional retirement information, has been mailed to our payroll office on 11/25/2015. Our payroll office will forward your application to the U.S. Office of Personnel Management (OPM) for a final decision. OPM should notify you of their decision within 120 days of their receipt of your application.

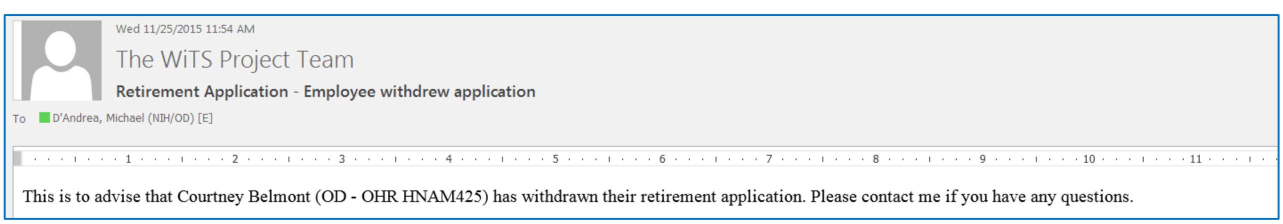
Please contact me by email reply or by phone at 301-496-4556 if you have any additional questions or want to make any changes.

- **Notify CSD - Retire Date Changed Email:** Sends an email, from the Benefits Specialist, to the CSD Branch Chief(s) associated with the IC selected on the form of the employee’s retirement date change. *The admin code displayed on the email comes from NED and is obtained from the NED ID entered on the form.*


Wed 11/25/2015 12:02 PM
The WiTS Project Team
Retirement Application - Effective Date Change
To D'Andrea, Michael (NIH/OD) [E]

This is to advise that Courtney Belmont (OD - OHR HNAM425) has changed the effective date of retirement to 11/29/2015. Please contact me if you have any questions.

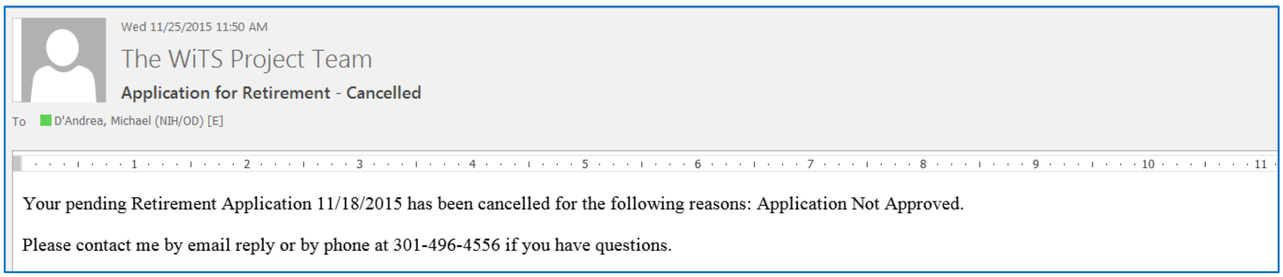
- **Notify CSD - Employee Withdrew Email:** Sends an email, from the Benefits Specialist, to the CSD Branch Chief(s) associated with the IC selected on the form of the employee’s withdrawal. *The admin code displayed on the email comes from NED and is obtained from the NED ID entered on the form.*


Wed 11/25/2015 11:54 AM
The WiTS Project Team
Retirement Application - Employee withdrew application
To D'Andrea, Michael (NIH/OD) [E]

This is to advise that Courtney Belmont (OD - OHR HNAM425) has withdrawn their retirement application. Please contact me if you have any questions.

- **Send to Benefits Assistant:** Sends the action to the Benefits Assistant selected on the form.

- **Send to Another Benefits Specialist**: Sends the action to the Benefits Specialist selected on the form.
- **Completed - Send to Archives**: After the employee retires, this response completes the action and moves it to Archives. Before completing the action, be sure all fields have been updated. Once the action has been archived, it cannot be edited.
- **Cancel**: Sends an email to the employee notifying him/her that the retirement has been cancelled, automatically moving the action to Archives. Before sending this response, you must select a "Reason for Cancellation" from the drop-down field at the bottom of the form. The option you select will be included in the email. *An email will not be sent if the selected reason is "Duplicate/Erroneous WiTS Action".*


Wed 11/25/2015 11:50 AM
The WiTS Project Team
Application for Retirement - Cancelled
To D'Andrea, Michael (NIH/OD) [E]

Your pending Retirement Application 11/18/2015 has been cancelled for the following reasons: Application Not Approved.

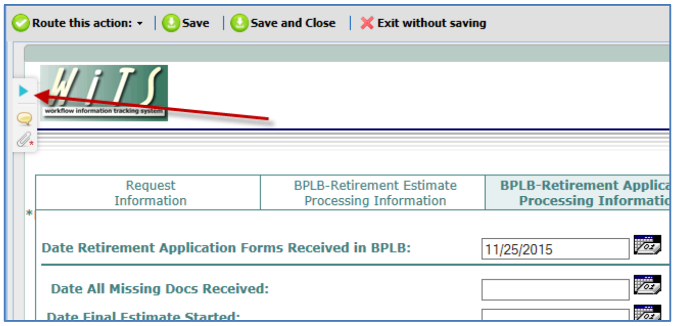
Please contact me by email reply or by phone at 301-496-4556 if you have questions.

Comments – Internal Discussion

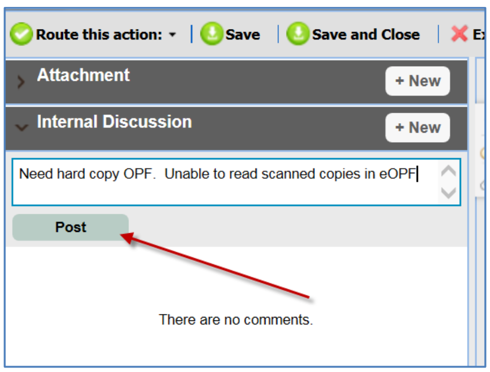
BPLB uses the WiTS Internal Discussion feature to track the progress of retirement actions. Staff are encouraged to use this feature to note the status of their retirement actions.

To enter a comment, follow these steps:

1) Access the action and open the pane on the left-hand side

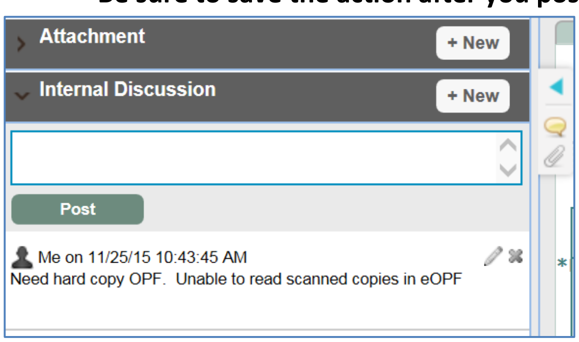


2) Enter your comment under the Internal Discussion section and then click 'Post'



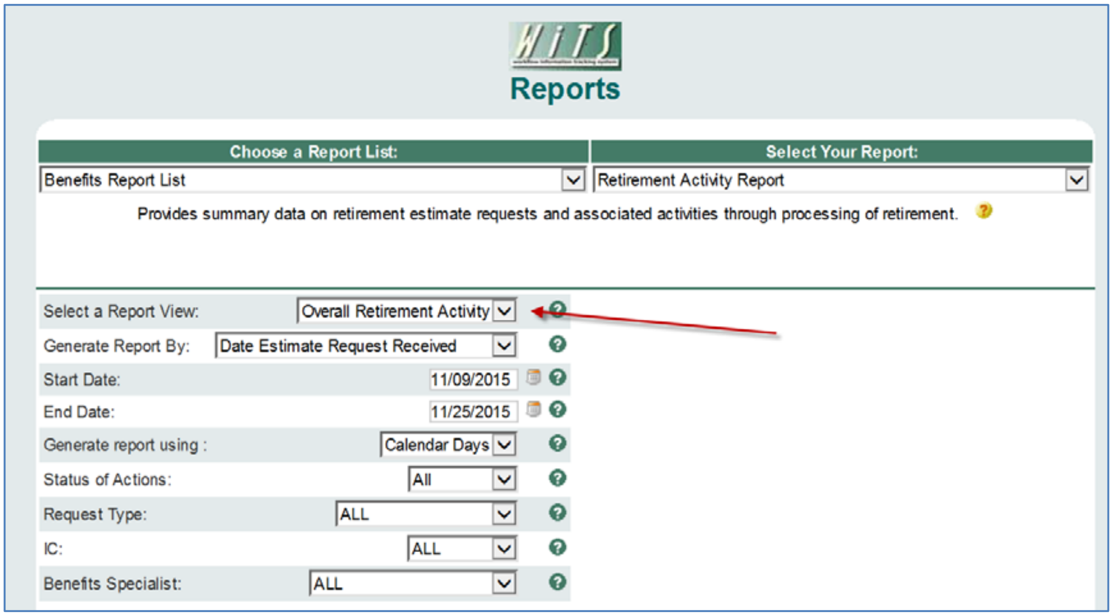
3) After posting the comment, it will be displayed within the action. If you created the comment, it will show "Me" as the author. If someone else created the comment, it will show their last name. You can edit a comment by clicking on the pencil icon and you can delete a comment by clicking on the 'X'. *You cannot edit or delete a comment entered by someone else.*

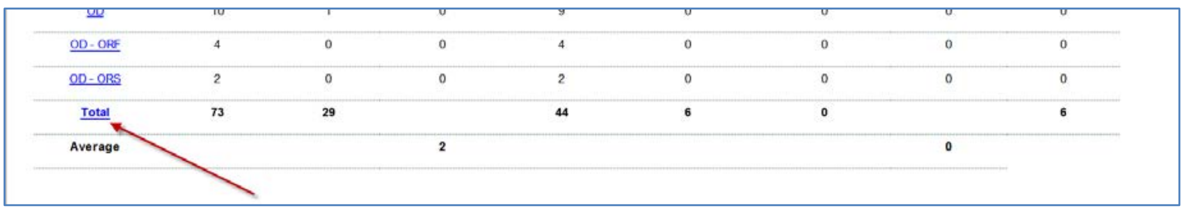
✓ **Be sure to save the action after you post your comment!**

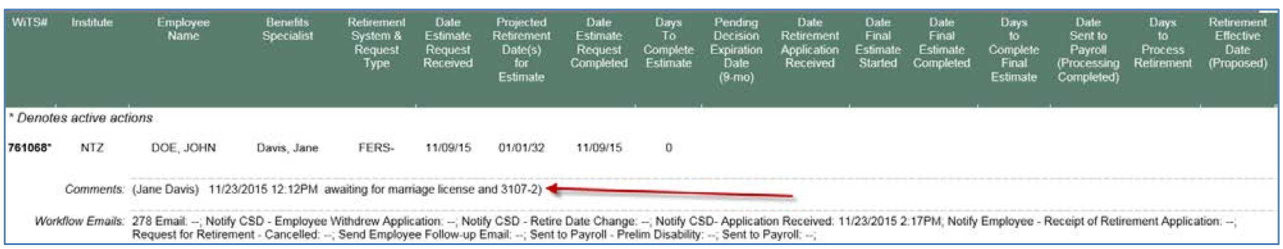


Last Updated: 11/25/2015

These comments are only displayed on the Overall Retirement Activity Report, total drilldown view.







Exit Survey – Retirement Actions

WiTS sends the following notification to the employee who is nearing Retirement. The email invites the employee to take an exit survey. The email is sent no earlier than 30 days prior to the employee's Effective Date on the retirement action.

From: SAID Survey Team (NIH/OD)
Sent: Fri 8/29/2014 12:15 PM
To: Murphy, Kevin (NIH/OD) [E]
Cc:
Subject: NIH Invites you to participate in the Exit Survey

Dear Kevin,

The NIH invites you to participate in a survey for staff who are separating or retiring from the organization. We ask you to take a few minutes to complete the NIH Exit Survey online, located at the following address: http://exitsurvey.nih.gov.

Your participation is voluntary and confidential. All responses will be combined into aggregate reports by Office of Human Resources Survey Team.

Your perspective will help NIH Management identify employee concerns to better address the needs of the organization. Thank you in advance for your candid feedback on the Exit Survey and best wishes in your future endeavors.

If you have difficulty accessing the NIH Exit Survey, or you believe you have received this email in error, please contact HR Systems Support at hrsystemssuport@mail.nih.gov for assistance.

Thank you.