

Instructions for FEHB Enrollment Change Cover Sheet and Assembling Retirement Application Packages

FEHB Enrollment Change Cover Sheet

1. Print cover sheet on light colored paper (preferably blue) instead of white paper.
2. Check the box for the FEHB form and documents included in the retirement application package.
3. Put the *FEHB Enrollment Change Cover Sheet* on the top of the retirement application package.
4. Place the FEHB form and documents for the FEHB enrollment change immediately behind the cover sheet.

General Assembly Guidance for Non-Disability Retirement Application Packages

1. Always check every page in the package and make sure the applicant's name, date of birth (DOB), and social security number (SSN) match.
2. Set 2-hole punch at 8.5 inches.
3. Punch holes with 2-hole punch on the top of all portrait orientation (vertical) pages and on the right side of all landscape orientation (horizontal) pages.
4. Forms of the same number should be kept together and placed in reverse chronological order by effective date (most recent date on top, oldest date on the bottom).
5. Partial pieces of paper or small papers should be stapled to a blank full sheet of paper (8.5 inches x 11 inches) to be included in the package.
6. Do not tear papers off prongs in physical Official Personnel Folders (OPFs) or other folders. This damages the form and will need to be repaired prior to submission to OPM. If this area is torn, use clear tape on the document to create an area that can be hole punched.
7. Any ripped or torn pages in the package will need to be repaired with clear tape prior to submission to OPM.
8. If there is a SF 2809 with an effective date **after** the retirement date or a RI 79-9 with supporting documentation in the package, place on top of retirement package with *FEHB Enrollment Change Cover Sheet*.

Document Order for Non-Disability Retirement Application Package Submissions

In order from top of package to bottom of package.

1. *FEHB Enrollment Change Cover Sheet*
2. FEHB form (SF 2809 or RI 79-9) and supporting documents for FEHB enrollment changes effective after retirement
3. Cover sheet for special retirement type (National Guard Technicians, Law Enforcement Officer, Firefighter, Air Traffic Controller, etc.)
4. Individual Retirement Records (IRRs) – SF 2806, SF 3100, SF 2806-1, SF 3101, computer printout IRR, High 78 – **do not punch holes through data**
5. Military Service Deposit IRRs – SF 2806, SF 3100 (only the IRR, no other document)
6. Certified Summary of Federal Service – SF 2801-1, SF 3107-1
7. RTR, RTR detail, FAA 3300; Certification of Service as LEO, FF, NMC, CBPO 535, or ATC – RI 20-124; Air Traffic Controller retirement SF 50
8. Agency Checklist – SF 2801 - Schedule D, SF 3107 - Schedule D
9. FEHB – SF 2809s, SF 2810s, electronic system FEHB printouts, FEHB memo (place memo on top of other FEHB forms) – **keep all FEHB forms together in reverse chronological order (most recent effective date on top)**
10. Agency Certification of Life Insurance – SF 2821
11. Continuation of Life Insurance Coverage election – SF 2818
12. FEGLI election – SF 2817, SF 2822, SF 53, SF 55, RI 76-27, FE2004, SF 176, SF 176A, SF 50 in lieu of SF 2817 – **keep all FEGLI election forms together in reverse chronological order (most recent effective date on top)**
13. FEGLI Notice of Conversion Privilege – SF 2819
14. FEGLI Designation of Beneficiary – SF 2823, SF 54
15. CSRS and FERS Designation of Beneficiary – SF 3102
16. Any other Designation of Beneficiary
17. Application for Retirement – SF 2801, SF 3107 (if voided check is included place after Section I) – **must always have this form in package**
18. Schedule A, B, C – SF 2801, SF 3107
19. Spouse's Consent to Survivor Election – SF 2801-2; SF 3107-2
20. Marriage Certificate
21. Military Service Deposit Election – OPM Form 1515
22. FERS Election, Former Spouse's Consent to FERS – SF 3109, SF 3110

23. Agency Officer of Position – OPM Form 1510
24. Military Discharge paperwork – DD 214 or equivalent
25. Waiver of military retired pay
26. Notification of Personnel Action – SF 50, PS 50
27. Request for military earnings – RI 20-97
28. Military Deposit Application, worksheets (all military deposit info), Refund Application – SF 2803, SF 3108, OPM Form 1514, SF 2802, SF 3106
29. Voluntary Contributions Application (CSRS only) – SF 2804
30. Voluntary Contributions Election (CSRS only), Alternative Annuity Roll Over Election, NAF Election – RI 38-124, RI 38-122, RI 38-145
31. Government Debt – SF 2805
32. All other forms and papers not listed
33. Agency Retirement Benefit Estimate
34. FERCCA information – Erroneous retirement coverage papers
35. Certified copy of court order (divorce decree, etc.)
36. Federal tax withholding election; place State tax on top of Federal – W-4P
37. Direct deposit forms or EFT form