

Election to Retain CSRS, CSRS Offset, or FERS Retirement Coverage As a Result Of A Move From A Civil Service Position To A NonAppropriated Fund (NAF) Position On or After December 28, 2001

Instructions: The Human Resources Office will complete Part 1 of this form and give it to the employee. The employee must indicate his/her election by signing in Part 3 and returning the signed form to the Human Resources Office on or before the due date shown in Part 1.

Part 1 - (To be completed by agency)

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|---|---|------------------------|
| Employee's name (<i>last, first, middle</i>) | Date of birth (<i>mm/dd/yyyy</i>) | Social Security Number |
| Name of Civil Service Retirement Plan (<i>CSRS, CSRS Offset, or FERS</i>) | Due date (<i>mm/dd/yyyy</i>) Human Resources Office must receive election on or before _____ | |

I verify that in accordance with § 8347(q) and § 8461(n) of title 5 U.S.C., and OPM regulations at 5 CFR part 847, this employee is eligible to retain the civil service retirement plan identified in this part because he/she —

- (1) Has never previously had an opportunity to elect to retain that civil service retirement coverage; and
- (2) Has moved, on or after December 28, 2001, from a covered civil service appointment to a retirement covered NAF position without a break in service of more than 1 year.

| | |
|----------------------|------------------------------------|
| Authorized signature | Date of move (<i>mm/dd/yyyy</i>) |
| Title | Date signed (<i>mm/dd/yyyy</i>) |

Part 2 - Acknowledgement of Receipt and Notice of Effect of Failure to Elect

I understand that I am eligible to retain the civil service retirement coverage shown above. I acknowledge that the Human Resources Office has completed Part 1 of this election form and given it to me on this date. I understand that if I fail to complete Part 3 and return the completed form to the Human Resources Office before the close of business on the Due Date (shown in Part 1) I will automatically be considered to have chosen Option 2 in Part 3. I also understand that the option I choose below (or am automatically considered to have chosen) will restrict my retirement plan entitlement for the rest of my Government career and that I can never change this election regarding retention of civil service retirement coverage as a NAF employee.

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|----------------------|----------------------------|
| Employee's Signature | Date (<i>mm/dd/yyyy</i>) |
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Part 3 - Employee's Election (*Instructions to employee: Sign only the box for the option that you elect.*)

Option 1: I elect to retain coverage under the civil service retirement plan identified in Part 1 of this election form. I understand that because of this irrevocable decision, I will never be able to earn additional credit under any NAF retirement plan. I understand that regardless of future moves between NAF and civil service employment, breaks in service, and changes in retirement status, my retirement coverage will remain with the civil service retirement plan identified in Part 1 in accordance with the rules governing that system.

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|----------------------|----------------------------|
| Employee's signature | Date (<i>mm/dd/yyyy</i>) |
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Option 2: I do *not* elect to retain retirement coverage in the civil service retirement plan identified in Part 1 of this election form. Because I have made this decision:

- (1) I will enter a NAF retirement plan without receiving any service credit in the NAF retirement plan for time spent under that civil service retirement plan.
- (2) I will not be given another opportunity to retain coverage in that civil service retirement plan if I ever move from a civil service appointment to a NAF position in the future. However, if I move back to a civil service appointment, I will be subject to civil service retirement coverage (CSRS, CSRS Offset, or FERS) in accordance with the appropriate civil service coverage rules.
- (3) If in the future I move back to civil service employment without a break in service of more than 1 year, I will be given a one time opportunity (if I never before have had the opportunity) to elect to retain membership in the NAF retirement plan or to become covered by the appropriate civil service retirement coverage (CSRS, CSRS Offset, or FERS).

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|----------------------|----------------------------|
| Employee's signature | Date (<i>mm/dd/yyyy</i>) |
|----------------------|----------------------------|

(Instructions on the reverse)

Instructions for Completing Election Form RI 38-144
Election to Retain CSRS, CSRS OFFSET, or FERS Retirement Coverage As a Result
Of A Move From A Civil Service Position To A DoD or Coast Guard NonAppropriated
Fund (NAF) Position On or After December 28, 2001

The Human Resources Office should:

- (1) Complete Part 1 of the form and make a copy. The due date is 30 days after the date of appointment. (This time limit may be waived by the DoD or Coast Guard Component for employees who, despite due diligence, are prevented by circumstances beyond their control from making an election within the time limit.)
- (2) Give both copies of the form to the employee and instruct the employee to read and acknowledge receipt by signing Part 2 of one copy of the form.
- (3) Collect the copy of the form that the employee signed (with both Parts 1 and 2 completed) and file it on the left side of the Official Personnel Folder (OPF), or in some other temporary file. Keep it there until the employee makes an election, or the time limit for making an election expires.
- (4) If the employee makes an election by signing under either Option 1 or Option 2 in Part 3 of the form, mark the date you received the form. Photocopy the form. File the form with the original signature in Part 3 on the right side of the OPF, and return the other copy to the employee. Destroy the copy of the form with Part 2 completed.

If the employee fails to return the election form before the time limit expires, note on the form with Part 2 completed that the employee did not file a form with Part 3 completed, and file it on the right hand side of the OPF.

- (5) If the employee elects to retain coverage in CSRS, CSRS Offset, or FERS, place the *Notice of Civil Service Retirement Election* flag on the right side of the OPF. This flag will serve to alert subsequent employing NAF Components or civil service employers that the employee is covered by CSRS, CSRS Offset, or FERS and is excluded from coverage in a NAF retirement plan.

The Employee should:

- (1) Acknowledge receiving the form by signing Part 2 of one copy and returning it to the Human Resources Office.
- (2) Keep a copy of the form with only Part 1 completed.
- (3) Make a retirement coverage election by signing Option 1 or Option 2 in Part 3 of the form. Submit the election to the Human Resources Office by the Due Date shown in Part 1. If you fail to submit an election by the due date, you will be considered to have elected Option 2 in Part 3.