



**U.S. Office of  
Personnel Management**

**Benefits Officers Conference  
1998**

**Benefits Roundup**

**June 10-12, 1998**

**Sheraton Baltimore North Hotel  
Towson, Maryland**

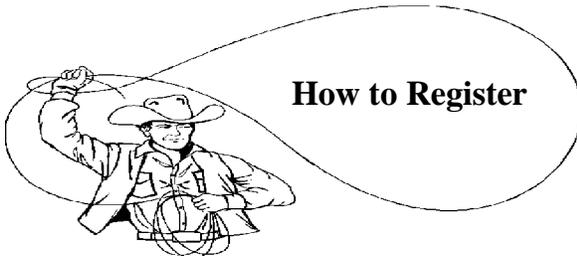


**Howdy Partner! Hitch up the wagons, saddle the horses and get ready for the 1998 Benefits Roundup. This year's Benefits Officers Conference will be bigger and better than ever.**

We all are challenged to carry out our responsibilities more effectively and provide better customer service. Our ability to succeed in providing up-to-date information to our employees in a constantly changing environment requires constant efforts to expand our knowledge and skills. One of the best ways to help you meet that challenge is to attend this year's conference. The Benefits Roundup will help lasso the information you need about retirement, insurance, and payroll related issues. With increased focus on customer service, it becomes increasingly important for everyone to know how their actions interact with those of others and the affects they have on their customers. Payroll and personnel need a fuller understanding of each others roles. This year we are expanding the focus of the conference to include payroll related topics and are providing breakout sessions on assuring the integrity of the benefit programs. We've corralled the best ranch hands in the territory to show you the ropes about such issues as workers compensation, tax questions, interactions between payroll and personnel, and the thrift savings plan.

Before the conference we'll offer two days of pre-conference workshops. These workshops offer an intensive, high-energy learning experience on the selected topics.

Attendance at conference or pre-conference workshops meets the requirement in 5 U.S.C. 8350(3) that "once each year, each retirement counselor of an agency shall successfully complete a training session conducted under the [U.S. Office of Personnel Management] training program."



### **How to Register**

Each attendee must submit a registration form. If you have any special needs or dietary restrictions (e.g., diabetic, vegetarian), please note them on the registration form.

We must receive both the registration form

**and** payment information (either credit card information or completed Standard Form (SF) 182 or Department of Defense (DD) 1556 at the time of registration.

**Registration deadline is April 30, 1998.**

### **Methods of Payment**

The preferred method of payment is to charge the conference tuition fees to a government credit card. We will accept **only** government issued Visa and MasterCard credit cards. We **cannot** accept personal credit cards, or U.S. Government American

Express and Discover cards. A SF 182 is not required if you are paying by credit card.

If you do not pay by credit card, we will bill your agency. If your agency wants to be billed, you must submit both the SF 182 (or DD 1556) and your conference registration form.

**SF 182 or DD1556:** It is important that ALL BLOCKS on SF 182 be completed. Put the following codes across the top:  
Office of Personnel Management  
ALC: 24000001; Index:BC230A;  
Project: C230B8AB--071500

Be sure to complete all blocks on SF 182, including complete accounting information in Block 21 and your agency's ALC in Block 24. In item 25, include the finance office designation and phone number. Authority: 31 U.S.C. 1535.

We prefer that agencies use Treasury's **Online Payment and Collection System** if you are not charging the conference fees to a credit card.

**Your registration is not complete until we receive both the conference registration and a completed and approved SF 182 or DD 1556.**

#### **Confirmation**

We will send confirmations of both pre-conference workshop and conference registrations by fax. The confirmation will contain directions for getting to the hotel.

#### **Costs**

##### **Benefits Officers Conference--1998**

**Benefits Roundup.** The tuition for the conference is \$575. This fee includes hotel

accommodations on June 10 and 11 and meals during the conference (lunch on June 10 through breakfast on June 12).

**Pre-conference Workshops.**--The tuition for the pre-conference workshops is \$150 for each 1-day workshop and \$225 for each 2-day workshop. Lunch is **not** included in the cost of the workshops.

#### **Cancellation Policy**

Cancellations are permitted up to May 8, 1998. Cancellations must be in writing. Agencies will be billed for spaces they have reserved if a cancellation is received after the deadline. Substitute attendees are permitted.

#### **Conference Location**

All official conference activities will be held at the Sheraton Baltimore North Hotel. Conference attendance may require us to use additional hotels in the immediate area of the conference hotel. We will assign rooms in the Sheraton Hotel on a "first come, first served" basis. Complimentary shuttle service will be provided. Parking at all hotels is free. All hotels are convenient to the Baltimore-Washington International (BWI) Airport.

#### **Additional Information**

For more information you may contact us via any of the following:

Fax: (202) 606-4327;

Email: [asd@opm.gov](mailto:asd@opm.gov);

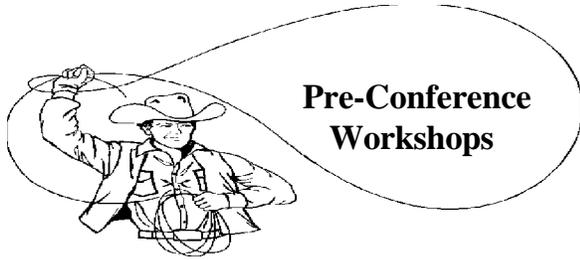
Phone: (202) 606-0777, extension 955;

Visit: [www.opm.gov/asd](http://www.opm.gov/asd); or

Log onto our electronic bulletin board

OPM ONLINE at (202) 606-4800

and visit the Retirement and Insurance Forum.



We will offer pre-conference workshops on June 8 and 9. These workshops generally are for people with a good basic knowledge of the subject. You may register for the workshops even if you are not registered for the Benefits Officers Conference. The tuition for the pre-conference workshops is \$150 for each 1-day workshop and \$225 for each 2-day workshop. Class sizes will be limited to facilitate questions and answers and exercises. Each class will be a full day, starting at 9:00 am.

### **FEHB X-Ray and FEGLI**

[2 days, June 8 & 9]

Day One & Morning of Day Two - **FEHB X-Ray** is an intensive review of the Federal Employees Health Benefits (FEHB) Program. This course examines the Program from an insider's perspective so that participants will understand the following: legislation and regulations affecting the FEHB, who does what in our Retirement & Insurance Service, the contracting cycle, different types of FEHB plans, communicating FEHB choices to employees, how the Office of Personnel Management, agencies and plans can be partners in success, and measuring quality and customer service.

Afternoon of Day Two - **FEGLI** - discussion of what's new and exciting about the Federal Employees' Group Life Insurance (FEGLI) Program. Instructors will talk about the new FEGLI regulations, and how they affect the program. It is possible that

new FEGLI legislation may be enacted prior to the date of the training. If so, instructors will talk about how the new legislation will affect the FEGLI Program.

### **Reemploying Annuitants**

[1 day, June 8]

Reemployment of retired employees is one way for an agency to meet short or long term staffing needs. However, as you know, some rather complicated rules apply when you reemploy annuitants. This **1-day** workshop will provide you with the background, knowledge and skills to effectively and smoothly reemploy annuitants.

We will cover what the agency needs to tell us about their reemployed annuitants, what the agency needs to learn from us, and how to use this information. Among the issues covered will be determining correct retirement coverage, when the annuity will continue and when it will terminate, how to compute the salary offset for annuity, and how health benefits and life insurance are affected and who is responsible for administering them.

You will also learn what further retirement rights reemployed annuitants have under both the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS) and how to counsel them on those rights, including when they would be eligible for a supplemental annuity, a redetermined annuity, or reinstatement of their original annuity. We will also discuss reemployment of Office of Workers Compensation Programs (OWCP) recipients and the special considerations they have.

## **Everything You Wanted to Know about Spousal Benefits and Were Afraid to Ask**

[1 day, June 9]

Survivor elections...Former spouses...Court orders...Federal Employees Retirement System death benefit...

Spousal benefits generate a lot of employee questions. This **1-day** workshop is going to focus on the various benefits available to spouses and former spouses under the Civil Service Retirement System, the Federal Employees Retirement System, and the Federal Employees Health Benefits program.

The workshop will take a look at the entire range of benefits for spouses (and former spouses) and provide you with what you need to know about spousal benefits to answer those employee questions.

## **Retirement Coverage Issues**

[1 day, June 8]

This **1-day** workshop is designed to provide participants information on retirement coverage issues, including application of the coverage rules, opportunities to transfer to FERS, deemed FERS elections, and proposed legislation to address long term retirement coverage errors.

## **Understanding Military Retirement for Counseling Employees and Retirees**

[1 day, June 8]

This **1-day** workshop will provide benefits counselors with information about military benefits that they need in counseling employees and retirees who are receiving military retired pay. This course will describe the retirement benefits payable from the military, including survivor benefits and benefits for former spouses. It will examine the interface between military retirement benefits, Department of Veterans Affairs disability compensation, and Social Security.

It will review the various offset issues associated with retired military personnel employed in Federal civilian positions (reduction in military retired pay, dual compensation pay cap, exemptions, etc). In addition, it will discuss key points benefits counselors should cover with military retirees, and it will outline the various issues military retired personnel must resolve when making decisions that affect their military benefits. Any topics of related interest submitted by attendees in advance will also be addressed.

## **Social Security Overview**

[1-day, June 8]

The **1-day** workshop, presented by staff from the Social Security Administration, will present an overview of the Social Security system and the benefits available. The workshop will cover the rules for entitlement to Social Security benefits, including retirement, disability, family and survivor benefits. Also covered in the workshop will be the Personal Earnings and Benefit Estimate Statement and the calculation formula for Social Security benefits. The coordination of benefits between CSRS/FERS and Social Security, the Government Pension Offset, and the Windfall Elimination Provision will also be discussed.

This workshop is appropriate for persons who have had little previous experience in working with Social Security.

## **Interrelationship of Government Pensions and Social Security Benefits**

[1 day, June 9]

The goal of this **1-day** workshop is to provide human resources personnel with an understanding of the interrelationships of Civil Service Retirement System and Federal Employees Retirement System and Social

Security benefits. The workshop will cover the reduction factors to these benefits through the Government Pension Offset, Windfall Elimination Provision, Civil Service Retirement System Offset, and "Catch 62" reduction for military service credit.

The workshop will also examine the impact caused by the interrelationship of the benefits for individuals under each retirement system on disability retirement, pre- and post-56 military credit, military retirement pay, and survivor benefits.

Calculators are provided to class participants.

### **Office of Workers Compensation Programs and Disability Benefits**

[1 day, June 9]

This **1-day** workshop provides an overview of the Federal Workers' Compensation Act and the disability retirement programs under both the Civil Service Retirement System and the Federal Employees Retirement System. In addition, this workshop will provide information on how the two programs interact, including information on what benefits are payable under both programs, how elections are made when compensation and disability retirement are both available, when payments can be paid under both programs, and how life insurance is handled.

### **Counseling Employees in Crisis**

[1 day, June 9]

This **1-day** workshop focuses on the wide array of skills needed to provide benefits counseling in emotionally charged situations such as death of a family member, retirement because of disability, or involuntary retirement. In these situations, the benefits counselor needs to pull together a wide range of technical information, and to respond in a caring, sensitive manner to customers who may be in severe distress. In large scale emergencies, the benefits staff may face an overwhelming workload while dealing with their own personal responses to the tragic event. The workshop will use role playing, small group discussions, and other experiential learning approaches to help participants practice and refine their skills. It will introduce not only counseling issues, but also issues related to planning for crisis situations, locating resources, and supporting staff members engaged in emotionally draining work.

Finally, we will discuss how and when to request enhanced liaison with us for emergencies or disasters, how to initiate our "fast track" processing for terminal illness or financial hardship, and exceptions to normal evidentiary requirements under extraordinary circumstances.

<b>Pre-Conference Workshops at a Glance</b>	
<b>Monday, June 8</b>	<b>Tuesday, June 9</b>
FEHB X-Ray and FEGLI	FEHB X-Ray and FEGLI (Continued)
Reemploying Annuitants	Everything You Wanted to Know about Spousal Benefits and Were Afraid to Ask
Understanding Military Retirement for Counseling Employees and Retirees	Office of Workers Compensation Programs (OWCP) and Disability Benefits
Retirement Coverage Issues	Counseling Employees in Crisis
Social Security Overview	Interrelationship of Government Pensions and Social Security Benefits



**Plenary and Breakout Sessions Under Consideration:**

- \*Where the Money Goes
- \*Taxes
- \*Settlements
- \*Managing FERS Election Opportunities
- \*Medicare & FEHB
- \*Unemployment Compensation
- \*FEHB Reconciliation
- \*Correcting Payroll Records
- \*Benefits for the Year 2000
- \*FEHB Program--Future Directions
- \*Pay & Leave Updates
- \*Financial Planning Issues
- \*Program Performance Measures
- \*Conducting Business over the Internet
- \*Overview of Current Legislative Issues
- \*Benefits Best Practices
- \*Designations of Beneficiary (FEGLI, Retirement, TSP)
- \*Coverage Error Audits

The full agenda will be available on our Internet page ([www.opm.gov/asd](http://www.opm.gov/asd)) in the Spring.

## REGISTRATION FOR 1998 BENEFITS ROUNDUP

Name (for badge)		
Agency/Organization		
Business Address		
City	State	Zip
Internet Email Address:		
Day-time Phone: <span style="margin-left: 150px;">FAX:</span>		
Special Needs (Handicap and Dietary Restrictions)		
<b>Pre-Conference Workshops Registration</b> <input type="checkbox"/> FEHB X-Ray & FEGLI (2-days, June 8-9) [\$225] <input type="checkbox"/> Reemploying Annuitants (1-day, June 8) [\$150] <input type="checkbox"/> Understanding Military Retirement for Counseling Employees/Retirees (1-day, June 8) [\$150] <input type="checkbox"/> Retirement Coverage Issues (June 8) [\$150] <input type="checkbox"/> Social Security Overview (June 8) [\$150] <input type="checkbox"/> Spousal Benefits (June 9) [\$150] <input type="checkbox"/> OWCP and Disability Retirement Benefits (June 9) [\$150] <input type="checkbox"/> Counseling Employees in Crisis (June 9) [\$150] <input type="checkbox"/> Government Pensions & Social Security (June 9) [\$150]		
<b>TUITION:</b> Pre-Conference Workshops _____ 1998 Benefits Roundup _____ <b>Total:</b> \$ _____		
<b>Payment by SF 182/ DD 1556?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No <b>(If yes, completed SF 182 or DD 1556 MUST be attached.)</b>		
<b>Payment by Credit Card?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No		
Name on credit card: _____		
Credit card number: _____ Expiration date: _____		
Signature of card holder: _____		
Telephone number of card holder: _____		