



U.S. Office of Personnel Management



Fall Festival of Training

Improve your benefits counseling skills.

The U.S. Office of Personnel Management is offering an array of 1, 2, and 3 day workshops to help you increase your knowledge of the Federal retirement and insurance programs and to improve your counseling skills. If you are responsible for administering benefits in your agency or providing counseling to employees about their benefits you don't want to miss out on these informative workshops.

November 17-20, 1997

Hyatt Dulles
Herndon, Virginia

For more information
Fax: (202) 606-1108
Visit: www.opm.gov *or*
Call OPM ONLINE at (202) 606-4800
and visit the Retirement and Insurance Forum

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. These workshops will help you meet that challenge.

The workshops are scheduled over a 4-day period (Nov 17-20, 1997). You can register for any of the courses. These workshops are for people with a good basic knowledge of the subject. Class sizes will be limited to facilitate questions and answers and exercises. Each class will be a full day, starting at 9:00 am.

Attendance at one of these 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."

Fall Festival at a Glance

November 17	November 18	November 19	November 20
Annuity Computations Day 1	Annuity Computations Day 2	Annuity Computations Day 3	Part-Time Annuity Computations
Spousal Benefits Session A	Spousal Benefits Session B	Government Pensions and Social Security Session B	Law Enforcement/Firefighter Determinations
OWCP Workshop Day 1	OWCP Workshop Day 2	Disability Retirement Workshop	Retirement Coverage Issues
Reemploying Annuitants Day 1	Reemploying Annuitants Day 2	FEHB X-Ray and FEGLI Day 1	FEHB X-Ray and FEGLI Day 2
	Government Pensions and Social Security Session A		

Tuition: 1-Day workshop -- \$150
 2-Day workshop -- \$225
 3-Day workshop -- \$300

Description of Workshops Available

Civil Service Retirement System/Federal Employees Retirement System Annuity Computations [3-Days, Nov 17-19]

Knowing how an annuity is computed is an invaluable asset for people who provide pre-retirement counseling. Relying on an automated system to compute annuity estimates without being able to explain how the numbers are derived can result in an ineffectual, and even embarrassing, counseling session. This **3-day** workshop conducted by retirement specialists from the Office of Personnel Management (OPM) will cover the computation of annuities under both Civil Service Retirement System and Federal Employees Retirement System. Basic annuity calculations for age and service, early retirement, and disability retirement will be covered. The workshop will include sample calculations and focus on the use of annuity estimates as a counseling tool.

Part-time annuity calculations will not be covered in this workshop. Calculators will be provided to class participants.

Reemploying Annuitants [2-Days, Nov 17-18]

Buyouts, early outs, relocations, reallocations, reconfigurations, reinventions, rightsizing, downsizing have all left most agencies with skills imbalances and other short-term employment needs that are often met by reemploying recently retired personnel. This **2-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 OPM about their reemployed annuitants, what the agency needs to learn from OPM, 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 CSRS and 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 Program (OWCP) recipients and the special considerations they have.

Calculators will be provided to class participants.

Office of Workers Compensation Programs [2-Days, Nov 17-18]

This **2-day** workshop conducted by the Office of Workers Compensation, Department of Labor, will discuss supervisory/agency responsibilities under the program, the types of claims and benefits, the provisions of coverage, Continuation of Pay, and medical benefits. In addition, guidance and direction will be provided with respect to successfully managing an agency's internal workers' compensation program, including the importance of return to work initiatives.

FEHB X-Ray and FEGLI [2-Days, Nov 19-20]

Day One & Morning of Day Two - **FEHB X-Ray** is an intensive review of the Federal Employees Health Benefits Program. For many, the FEHB is very mysterious. This course examines the Program from an insider's perspective so that participants will understand

- ✓ Legislation and Regulations Affecting the FEHB
- ✓ Who Does What In OPM's Retirement & Insurance Service
- ✓ The Contracting Cycle (reviewing new plans, negotiating benefits, calculating rates, producing plan brochures and FEHB Guides)
- ✓ Different Types of FEHB Plans
- ✓ Communicating FEHB Choices To Employees (how to make an informed choice)
- ✓ Partners In Success (OPM, Agency and Plan responsibilities defined)
- ✓ Measuring Quality and Customer Service
- ✓ Trend Watch and New Directions

Afternoon of Day Two - **FEGLI** - a discussion of what's new and exciting about the Federal Employees' Group Life Insurance Program. Instructors will talk about the new regulations, and how they affect the program. It is possible that new legislation may be enacted prior to the date of the training. If so, instructors will talk about how the new legislation will affect the program.

Topics d'jour will include designations of beneficiary, designating a minor child, proper use of the certification of insurance status form, continuing life insurance into retirement, new editions of life insurance forms, etc.

Attendees will also receive a videotape covering assignments and living benefits. The tape features OPM experts and includes a "tour" of the Office of Federal Employees Group Life Insurance.

Interrelationship of Government Pensions and Social Security Benefits [1-Day, Session A--Nov 18, Session B--Nov 19]
The goal of this **1-day** workshop taught by experts from the Social Security Administration is to provide human resource personnel with an understanding of the interrelationships of Civil Service Retirement

System, 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.

The workshop will consist of lecture, interactive discussion, and sample exercises. Calculators will be provided to class participants.

Everything You Wanted to Know about Spousal Benefits and Were Afraid to Ask [1-day, Session A--Nov 17, Session B--Nov 18]
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 employee questions.

Counseling Employees for a Disability Retirement [1-Day, Nov 19]
The goal of this **1-day** workshop is to provide participants with the information they need to effectively counsel employees for a disability retirement. The workshop

will cover the criteria for entitlement, the submission and processing procedures, information on benefits available to employees once a disability retirement has been approved, and a demonstration of how to compute an estimate of benefits for a disability retirement under CSRS, CSRS Offset, and FERS. The workshop will consist of lecture, sample exercises, and interactive discussion of sample situations.

Computing Part-time Annuity Estimates [1-Day, Nov 20]

Through lecture, case study, and practical exercises, this **1-day** workshop will focus on the computation of CSRS and FERS annuity estimates for employees with part-time service. This workshop is geared toward personnel specialists who **already possess a basic understanding of a manual annuity computation** as outlined in **Chapter 50** of the *CSRS and FERS Handbook for Personnel and Payroll Offices*. This workshop highlights the steps involved in computing a part-time annuity as described in the *Handbook* in **Chapter 55, Computation for Part-Time Employees**. During this workshop, participants will learn and practice how to:

- Identify the pre-April 7, 1986 CSRS high-3 average salary period,
- Identify the post-April 6, 1986 CSRS high-3 average salary period,
- Identify the FERS high-3 average salary period,
- Compute the CSRS proration factor,
- Compute the FERS proration factor,
- Determine the retirement factors for computing the pre-April 7, 1986, and post-April 6, 1986, segments of the CSRS part-time annuity benefit,
- Compute a CSRS part-time annuity estimate and a FERS part-time annuity estimate.

Calculators will be provided to class participants.

Law Enforcement/Firefighter

Determinations [1-Day, Nov 20]

This **1-day** workshop is designed for personnelists who must know the rules of coverage for law enforcement and firefighter special retirement, certify retirement eligibility under the special law enforcement/firefighter provisions, or audit employee records to assure that employees have continuation of coverage under law enforcement/firefighter special retirement.

Topics covered in this workshop include:

- Rules of law enforcement/firefighter special retirement
- Primary and secondary positions
- Transfer requirements
- Determination process
- Who is covered and who is not
- How to audit employee records to determine eligibility
- Certification of law enforcement officers and firefighters under special retirement

The audience for this workshop is personnelists who must determine whether employees are covered under the special retirement provisions and certify eligibility at the time of retirement to OPM.

The objectives for the workshop are that personnelists will be able to review and audit employee records and certify eligibility for retirement under the special provisions for law enforcement officers and firefighters.

Retirement Coverage Issues

[1-Day, Nov 20]

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.

About the Workshops

Location: All workshops will be at the Hyatt Dulles. The Hyatt Dulles is located at 2300 Dulles Corner Blvd, Herndon, VA. A block of rooms at the government rate of \$124, including tax, have been reserved. Attendees who will be staying overnight should make reservations directly with the Hyatt indicating that they are attending the OPM training. This will insure the proper rate is charged for overnight accommodations. The telephone number for reservations is (703) 713-1234.

Workshop times: Registration will begin each day at 8:00 am. The workshops will begin promptly at 9:00 and end at 4:30 pm.

Tuition:

- 1-Day workshop -- \$150
- 2-Day workshop -- \$225
- 3-Day workshop -- \$300

Tuition includes: **Workshop Handbook** -- Filled with extra space for your notes, this handy reference guide will prove to be an indispensable resource back at the office. Keep it close at hand for future reference.

Certificate of Completion -- Upon conclusion of the workshop you'll receive a certificate suitable for framing, a copy makes an excellent addition to your official personnel file.

Lunch -- Lunch is included as an integral part of your training experience to provide you with the opportunity to informally talk with the instructors and other Office of Personnel Management retirement and insurance experts as well as a chance to network with other benefits professions.

How to Register

Each attendee must submit a workshop registration form to the U.S. Office of Personnel Management's Agency Services Division. **Due to security concerns, at this time we are NOT accepting registrations via email.**

Registration deadline is November 7, 1997.

Methods of Payment: The preferred method of payment is to charge the workshop tuition fees to a government credit card. If you are paying by credit card, all we need is the credit card information requested on the workshop registration form.

If you do not pay by credit card, the Office of Personnel Management will bill your agency. If your agency wants to be billed, you must submit both the Standard Form 182 (or Department of Defense Form 1556) and your workshop registration form.

Standard Form 182 (or Department of Defense Form 1556): It is important that ALL BLOCKS on Standard Form 182 be completed. Put the following codes across the top:

Office of Personnel Management's ALC: 24000001 --Index:BC230A --Project: C230B8AB --071500

Be sure to complete all blocks on Standard Form 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 workshop fees to a credit card.

Registration Form

Use a separate workshop registration form for each individual. (Photocopies of the conference registration form are acceptable.) Please print or type in your name on the workshop registration form as you want it to appear on your badge and certificate.

You may **fax** us the registration form and, if not paying by credit card, the Standard Form 182 on: (202) 606-1108 or 606-4278.

or **send** your Workshop Registration Form and, if not paying by credit card, completed Standard Form 182 to:

Office of Personnel Management
Retirement and Insurance Service
Attention: Fall Festival
P.O. Box 57, Washington, DC 20044

or hand deliver it to:

Office of Personnel Management
1900 E Street, NW., Room 4351
Washington, DC 20415

Confirmation notices will be faxed during the week of November 10.

Cancellation Policy

Cancellations are permitted up to one week before the scheduled training date. Cancellations must be in writing. Agencies will be billed for spaces they have reserved if a cancellation is received after the deadline. Substitutions are permitted.

REGISTRATION FOR FALL FESTIVAL OF TRAINING

NAME (for badge)

Are you a Retirement Counselor? Yes No
Are you an Insurance Officer? Yes No

Agency/Organization

Business Address

City

State

Zip

Internet Email Address:

Day-time Phone:

FAX:

Special Needs (Handicap and Dietary Restrictions)

Fall Festival Class Registration

- Annuity Computations (3-days, Nov 17-19) [\$300]
- Reemploying Annuitants (2-days, Nov 17-18) [\$225]
- OWCP Workshop (2-days, Nov 17-18) [\$225]
- FEHB X-Ray & FEGLI (2-days, Nov 19-20) [\$225]
- Government Pensions & Social Security (Session A, Nov 18) [\$150]
- Government Pensions & Social Security (Session B, Nov 19) [\$150]
- Spousal Benefits (Session A, Nov 17) [\$150]
- Spousal Benefits (Session B, Nov 18) [\$150]
- Disability Retirement Workshop (Nov 19) [\$150]
- Part-Time Annuity Computations (Nov 20) [\$150]
- Law Enforcement Office/Firefighter Determinations (Nov 20) [\$150]
- Retirement Coverage Issues (Nov 20) [\$150]

TUITION: Total: \$ _____

Payment by SF 182/ DD 1556? Yes No

Payment by Credit Card? Yes No

Name on credit card: _____

Credit card number: _____

Expiration date: _____

Signature: _____