



***Benefits Administration Letter***

Number: 09-102

Date: May 26, 2009

**Subject: Information to Agencies to Improve Survivor Claim Processing  
upon the Death of a Federal Employee**

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OPM has experienced a high percentage of cases (currently around 60 percent) that require development prior to authorizing a survivor annuity payment or lump sum payment upon the death of a Federal employee. We request your help to reduce the processing time it takes to adjudicate survivor claims in death-in-service cases to less than 30 days after the employee's death. To achieve this goal, we have prepared this Benefits Administration Letter (BAL). This BAL supplements the information provided in BAL 00-105, dated May 10, 2000, titled "New Procedures to Expedite Payments to Spouses of Federal Employees Who Have Died." Complete and accurate documentation is essential for OPM to adjudicate benefits to survivors in a timely manner.

OPM and the Department of Navy (DoN) worked together to develop procedures and checklists to ensure the necessary documentation is complete before forwarding to the appropriate office for processing of payments. By appropriate office, we mean OPM, the Office of Federal Employees' Group Life Insurance (OFEGLI), and Federal Retirement Thrift Board. We found that DoN's procedures are very helpful and would like to share this information with all agencies via this BAL. We have taken DoN's internal forms and checklists and have generalized them for your use. We are aware there will be variations based on your specific agency's requirements. We are not requiring agencies to use these procedures. However, we believe these guidelines can be used by agencies to better assist the deceased employee's survivor(s) during this time of need, as well as providing OPM (and other entities) with the necessary information to expedite payment to the respective survivor(s).

Attachment 1 provides General Instructions for use by the agency specialist upon the death of a Federal employee. This includes preparing documentation for OPM, OFEGLI and the Federal Retirement Thrift Board for processing.

Attachment 2 is a Summary of Benefits. This Summary is a checklist of information and documentation identifying the different types of benefits potentially payable to the survivor(s). The agency specialist should “check-off” the items appropriate for the survivor, enclose the necessary forms and forward to the survivor(s).

Attachment 3 is the *Preliminary Information to OFEGLI Regarding the Death of an Employee*

Attachment 4 is the *Election Regarding Method of Payment for Unpaid Compensation*

Attachment 5 is the *Quick-Pay Worksheet for Employee Death in Service*

Attachment 6 is the *Employee Death Case Summary*

Our hope is that these documents will serve as models for agencies to utilize upon the death of a Federal employee. If you or the survivor needs further assistance, please contact OPM’s Retirement Operations Center at (724) 794-2005. Thank you for your continued support!

Kathleen M. McGettigan  
Deputy Associate Director  
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- Attachment 1 (General Instructions)
- Attachment 2 (Summary of Benefits)
- Attachment 3 (*Preliminary Info to OFEGLI Regarding the Death of an Employee*)
- Attachment 4 (*Election Regarding Method of Payment for Unpaid Compensation*)
- Attachment 5 (*Quick-Pay Worksheet for Employee Death in Service*)
- Attachment 6 (*Employee Death Case Summary*)