

BENEFITS FORMS AND PROGRAMS: A Job Aid and Checklist

Use this guide to help you complete the various forms you are required to submit as a new employee.

Follow the directions on the job aid to complete and fax back the Statement of Prior Federal Service (SF-144) prior to your entrance on duty (EOD) date.

In addition, complete as many of the other forms and conduct as much benefits research online as you can, as your time to do this in class will be limited.

If you have questions about any of the forms or programs, record them in the space provided on the job aid. A benefits specialist will be available during orientation to answer your questions.

NOTE: The deadlines and timeframes provided in this guide are not your only time to participate in the benefits programs. When conducting your research, pay attention to each program's policy on enrolling in or changing elections.

In addition, there is a checklist on the last page of this guide to help you in organizing your progress through these forms and programs.

Forms & Deadlines	Special Instructions
<p>SF-144 Statement of Prior Federal Service.</p> <p>Submit via fax prior to orientation.</p>	<p>REQUIRED: Complete and fax the form and all required supporting documentation prior to orientation.</p> <p>The SF-144 documents previous paid and unpaid work for the Federal government. Everyone must complete and return it, regardless of prior Federal status or if the information is included in your resume. A hardcopy of the form is provided in the benefits packet. You can also access it at http://www.opm.gov/forms/pdf_fill/sf144.pdf.</p> <ol style="list-style-type: none"> 1. Complete the form. If a section does not apply, write "NONE". <ul style="list-style-type: none"> • Section 4: Disregard this question. Information provided during the application process is not forwarded during the on-boarding process. • Section 5: Include unpaid internships and mark as unpaid on the form. Do not include employment as a contractor for the Federal Government. • Section 6: Provide copies of SF-50s as documentation for non-paid service (i.e. LWOP, Intermittent). • Section 7: Provide a copy of DD-214 Certificate of Release or Discharge from Active Duty (Member Copy 2, 4, or 7 are only accepted). You can request this on the National Archives website in the Veterans Records section (http://www.archives.gov/veterans/military-service-records) 2. Sign and date the form. 3. Fax the form and all supporting documentation* to 571-204-3816. 4. Place the completed form and supporting documentation in the forms envelope and bring it to orientation. You will only need it if there was an issue with the faxed copy. <p>* If you have prior federal service, it is your responsibility to provide the required supporting documentation to receive credit. Contact former Agencies to obtain the required supporting documentation of your Federal service. Examples of acceptable supporting documents are:</p> <ul style="list-style-type: none"> • Notification of Personnel Action, SF-50. It should begin with Appointment action and end with the Resignation/Separation action. • Service History Card from OPM. • For direct transfers with no break in Federal service, provide your final Earnings and Leave Statement. <hr/> <p>Questions for Benefits Specialists:</p>

Forms & Deadlines	Special Instructions
<p>EOD Direct Deposit and Tax Withholding Form.</p> <p>Complete the form online via an internal database during orientation.</p>	<p>This required form documents your banking account for direct deposit and your tax withholdings.</p> <ul style="list-style-type: none"> • Be prepared to complete the form in class: <ul style="list-style-type: none"> ○ Verify your bank account and routing number.* ○ Use the W-4 Worksheet (www.irs.gov) to help determine the number of exemptions to claim. • Complete the hardcopy included in your benefits packet as a guide for online completion. <p>*Note: You must have a checking or savings account for direct deposit. If you would like to open a new account, Northwest Federal Credit Union (NWFCU) will have representatives onsite to help you.</p> <hr/> <p>Questions for Benefits Specialists:</p>
<p>Request for Advance of Pay</p> <p>You have 60 days from EOD to request an advance of pay.</p> <p>Eligibility: Direct transfers and student conversions are eligible if there is a break in service of at least 90 days. Student hires are ineligible, with a few exceptions. Check with a Benefits Specialist if you are unsure of your eligibility.</p>	<p>Your first paycheck will be direct deposited approximately one month after EOD. This optional form enables you to request an advance in pay to assist you until you begin regular pay cycles.</p> <ul style="list-style-type: none"> • This form will be provided during orientation. • It is essentially a no interest loan. • Can request 1 or 2 pay periods of advance pay. • Direct deposits within 7-10 business days of processing. • Repay over 1 – 14 pay periods. <hr/> <p>Questions for Benefits Specialists:</p>

Forms & Deadlines	Special Instructions
<p>Health Benefits Election Form (SF-2809).</p> <p>Complete online via an internal database within 60 days of EOD.</p> <p>You cannot enroll prior to orientation.</p>	<p>Visit the Federal Employees Health Benefits (FEHB) Program website (http://www.opm.gov/healthcare-insurance/healthcare/) to research the various health insurance options available to you and your family. There are over 200 plan choices.</p> <p>Coverage eligibility:</p> <ul style="list-style-type: none"> • New EODs: Coverage begins the pay period after you enroll and is not retroactive. • Direct Transfers: Coverage is continuous from other Government agencies. <p>NOTE: Please make sure to have social security numbers and dates of birth for any dependents you have with you for easy reference.</p> <hr/> <p>Questions for Benefits Specialists:</p>

Forms & Deadlines	Special Instructions
<p>Life Insurance Election Form (SF-2817).</p> <p>Automatically enrolled in Basic life insurance.</p> <p>You have 60 days from EOD to make changes or waive coverage.</p> <p>Coverage is continuous for Direct Transfers from other Government agencies.</p>	<p>Visit the Federal Employees Group Life Insurance (FEGLI) Program website (http://www.opm.gov/healthcare-insurance/life-insurance/) to review the various life insurance options available to you.</p> <p>Although you are automatically enrolled in Basic life insurance, you are required to complete a hardcopy of the enrollment form. You must also complete the form if you elect additional coverage, or waive coverage all together.</p> <p>To complete the form:</p> <ol style="list-style-type: none"> 1. Access the form online at http://www.opm.gov/forms/pdf fill/sf2817.pdf. 2. Fill in the form with no corrections or strikethroughs. NOTE: Leave the Employing Agency line blank. 3. Click on "Save Form" at the bottom of the page to save the completed form onto your computer. 4. Click on "Print Form" to print a hard copy of the form. 5. Sign the form. 6. Place it in the forms envelope. 7. Bring it to orientation. <hr/> <p>Questions for Benefits Specialists:</p>

Forms & Deadlines	Special Instructions
<p>Supplemental Dental & Vision Insurance Program (FEDVIP).</p> <p>Complete online within 60 days of EOD.</p> <p>You cannot enroll prior to orientation.</p> <p>Direct Transfers who currently have coverage must speak with a Benefits Specialist during orientation.</p>	<p>Visit the FEDVIP website (www.benefeds.com or www.opm.gov/insure/dentalvision) to research the program.</p> <p>After EOD, to register and enroll:</p> <ul style="list-style-type: none"> • Click on the link “Register & Enroll”, located on the FEDVIP home page. • Follow the directions on the website to complete registration and enrollment. <hr/> <p>Questions for Benefits Specialists:</p>
<p>Federal Flexible Spending Account Program (FSAFeds)</p> <p>Complete online within 60 days of EOD.</p> <p>You cannot enroll prior to orientation.</p> <p>Direct Transfers who currently have coverage must speak with a Benefits Specialist during orientation.</p>	<p>Visit the FSAFeds website (www.fsafeds.com) to research the program.</p> <p>After EOD, to register and enroll:</p> <ul style="list-style-type: none"> • Under “Enrollment”, click on “New Hire Enrollment”. A popup window opens. • Click on the “Enroll” link. • Follow the directions on the website to complete enrollment. <hr/> <p>Questions for Benefits Specialists:</p>

Forms & Deadlines	Special Instructions
<p>Federal Long Term Care Insurance Program (FLTCIP)</p> <p>Complete online within 60 days of EOD with limited underwriting.</p> <p>You cannot enroll prior to orientation.</p> <p>Direct Transfers who currently have coverage must speak with a Benefits Specialist during orientation.</p>	<p>Visit the FLTCIP website (www.ltcfeds.com) to research the program.</p> <p>After EOD, to register and enroll:</p> <ul style="list-style-type: none"> • Click on the “Apply” tab. • Follow the directions on the website apply. <hr/> <p>Questions for Benefits Specialists:</p>
<p>Thrift Savings Plan</p> <p>Automatically enrolled to contribute 3% of base pay, including Direct Transfers.</p> <p>You can increase, decrease, or stop the contributions online via an internal database during orientation and at any time thereafter.</p> <p>Direct Transfers should submit a TSP-1 Attachment to report a TSP loan.</p>	<p>To review the Federal Employees Retirement System (FERS), visit the website (http://www.opm.gov/retirement-services/).</p> <p>To review the Thrift Savings Plan (TSP), visit the website (www.tsp.gov).</p> <hr/> <p>Questions for Benefits Specialists:</p>

Forms & Deadlines	Special Instructions
<p>Work Experience Supplement Form</p> <p>Complete within 1 year of EOD.</p>	<p>This form enables you to document prior work experience in the private sector or retired military that directly relates to your occupation at the Agency. If approved, you may be eligible to accrue annual and sick leave at a higher rate.</p> <ol style="list-style-type: none"> 1. Access the form online at www.cia.gov/careers/life-at-cia/welcome-to-cia/Work Experience Supplement.doc. In addition, access the accompanying attachment at www.cia.gov/careers/life-at-cia/welcome-to-cia/Attachment A - Enhanced Annual Leave Benefit.doc. 2. Print the form. 3. Sign the form. 4. Place it in the forms envelope. 5. Bring it to orientation. <hr/> <p>Questions for Benefits Specialists:</p>

BENEFITS CHECKLIST

	Forms & Benefits	Action to Take	Deadline
	SF-144 Statement of Prior Federal Service	<ul style="list-style-type: none"> • Complete form. • Fax form & documentation to 571-204-3816. • Bring hardcopies to orientation. 	Prior to first day.
	EOD Direct Deposit and Tax Withholding Form	<ul style="list-style-type: none"> • Verify bank information. • Determine exemptions. • Complete the form and bring to orientation. 	Complete online via an internal database during orientation.
	Request for Advance of Pay	Decide if you need a pay advance.	Complete within 60 days of EOD.
	SF-2809 Health Benefits Election Form	Research the various health insurance options.	Complete online via an internal database within 60 days of EOD.
	SF-2817 Life Insurance Election Form	<ul style="list-style-type: none"> • Research the various life insurance options. • Complete the form and bring to orientation. 	Automatically enrolled in Basic coverage. Complete within 60 days of EOD.
	Supplemental Dental & Vision Insurance Program (FEDVIP)	Research the program.	Complete online within 60 days of EOD.
	Federal Flexible Spending Account Program (FSAFeds)	Research the program.	Complete online within 60 days of EOD.
	Federal Long Term Care Insurance Program (FLTCIP)	Research the program.	Complete online within 60 days of EOD.
	Thrift Savings Plan	Research the plan.	Automatically enrolled at 3% of base pay. Changes can be made anytime via an internal database.
	Work Experience Supplement Form	Complete the form and bring to orientation.	Complete within 1 year of EOD.