Federal Employees Retirement System

Application to Make Service Credit Payment

Federal Employees Retirement System

Form Approved
OMB No. 3206-0134

To avoid a delay in processing your claim:

1. Read the attached information carefully.
2. Typewrite or print in ink.
3. Complete Part A in full. If you are currently a Federal employee, have your employing agency complete Part B.

Part A. To be Completed by the Applicant

1. Name *(Last, first, middle)*	2. List other names you have used	3. Birthdate *(mm/dd/yyyy)*
4. Address *(Number and street)*	5. Department or agency in which presently or last employed, including bureau, branch, or division	6. Social Security Number
(City, state and ZIP Code)	7. Location of employment *(city and state)*	8. Title of position
9. Have you previously filed any application under the Federal Employees Retirement System (FERS) or the Civil Service Retirement System (CSRS)? ☒ Yes, complete items 9a and 9b ☐ No	9a. Type of application ☐ Service credit payment ☐ Refund ☐ Return of excess deductions ☐ Retirement	9b. Claim number(s) *[if available]*

10. List below in chronological order all periods of Federal civilian service. Be sure all your service is listed so that the Office of Personnel Management (OPM) can bill you for the correct amount.

Department or Agency *(including bureau, branch or division where employed)*	Location of Employment *(city and state)*	Title of Position	Periods of Service		Check whether deductions were not withheld, withheld and refunded, or withheld and remain to your credit			Show which period of service you want to pay for first, second, etc., by putting the numbers 1,2,3,... in the box below
			Beginning Date (mm/dd/yyyy)	*Ending Date (mm/dd/yyyy)*	*Not Withheld*	*Withheld and Refunded*	*Withheld and Not Refunded*	

11. Are deductions for the Federal Employees Retirement System now being withheld from your salary? ☐ Yes ☐ No	12. If your answer is "No," give the date of separation from your last position under the Federal Employees Retirement System →	*Date of separation (mm/dd/yyyy)*
13. Signature of applicant	14. Telephone number (including area code) where you can be reached during the day ( )	15. Date *(mm/dd/yyyy)*

Part B. To be Completed by the Employing Agency

Instructions to the Agency - Do not use this application to verify service for leave, retention or other non-retirement purposes. Procedures for verifying service and establishing creditability of service are contained in the CSRS(Civil Service Retirement System)/FERS (Federal Employees Retirement System) Handbook for Personnel and Payroll Offices. If more space is needed for the information requested in item 4, please attach a separate sheet. Show the name and Social Security Number of the applicant on the separate sheet (SF 3107-1 may also be used for this purpose).

1. Is the employee covered by the Federal Employees Retirement System (FERS)?

☐ No ☒ Yes →

2. Provide date FERS deductions began for the current appointment. ***(May be before January 1, 1987, if employee was automatically covered by FERS or all of a transferee's service will be credited under FERS rules.)*** →

3a. Did this employee elect to transfer to FERS?

☒ No ☐ Yes →

Effective date of election (mm/dd/yyyy)

3b. If yes, provide the date CSRS retirement deductions began →

Date CSRS deductions began (mm/dd/yyyy)

3c. Is this employee entitled, according to your records, to have part of his/her future retirement annuity computed under CSRS rules?

☐ No ☐ Yes

4. **Civilian Service Not Under FERS or CSRS**

From verified service documented in official personnel records, list any Federal civilian or District of Columbia Government service not covered by FERS or CSRS deductions which you believe is potentially creditable. If a period of service was subject to another retirement system for Federal employees, note this in the **Leave Without Pay** column. If total basic salary earned for any such period of service is known, a summary entry may be entered on the right-hand side below. Otherwise, show each change affecting basic salary during the period of service. List any period of nondeduction service claimed on the front of this form which cannot be verified from official records and note it in the **Leave Without Pay** column as **Unverified**. Service which was not subject to FERS or CSRS deductions is creditable only as specifically allowed by law. ***NOTE:*** This information will also be requested on the SF 3107-1 in connection with the employee's retirement. File a copy of this schedule on the right side of the Official Personnel Folder to facilitate completion of the SF 3107-1.

Nature of Action *(Appt., pro., res., etc.)*	**Effective Date** *(mm/dd/yyyy)*	**Basic Salary Rate**	**Salary Basis** *(per annum, per hour, WAE, etc.)**	**Leave Without Pay**	**If Basic Salary actually earned is available, make summary entry below**		
					From *(mm/dd/yyyy)*	***To*** *(mm/dd/yyyy)*	***Total Earned***

Comments

* If part-time, provide the number of hours in the scheduled tour of duty and dates of each change in tour of duty. If employee claims to have worked more than the scheduled tour(s), provide number of hours worked at each pay rate. If intermittent (WAE), provide the number of hours worked, if available, at each pay rate.

Certification - The information entered above is based on official records of this agency and is correct. There is no official personnel or fiscal record in this agency of the additional service (if any) alleged by the employee and marked *unverified* in item 4.

Agency address	Signature	Date *(mm/dd/yyyy)*
New Mexico National Guard Human Resource Office 47 Bataan Blvd. Santa Fe, New Mexico 87508-4695	Official title	Email address
	Telephone number (including area code) ( )	Fax number (including area code) ( )

Print Form Save Form Clear Form

Information About Service Credit Payments

Federal Employees Retirement System

Detach this sheet before filling out the application and save it for your records.
Read this information carefully before filling out the attached application.

Who Should Use this Application?

You should use this application if you are covered by the Federal Employees Retirement System (FERS) and you want to pay for civilian service so that you can receive retirement credit for the service. You should also use this application if you transferred to FERS and want to pay for service which will be credited under Civil Service Retirement System (CSRS) rules.

If you are under the Civil Service Retirement System, use Standard Form 2803, *Application to Make Deposit or Redeposit*, which is available from your personnel office, to apply to pay for service.

Requesting Additional Information About Past Service

If you are currently a Federal employee and you want to know whether: (1) a period of service will be creditable for retirement; (2) retirement deductions were withheld from your pay; or (3) you received a refund for a period of service, ask your agency for assistance. If you decide to pay for some periods of service, but not others, discuss this with your agency retirement counselor. It may be more advantageous for you to pay for certain periods of service instead of others. Different types of service are subject to different rules about crediting the service toward eligibility to receive an annuity and computing the actual annuity and average salary. If you are not currently a Federal employee, you can call the Office of Personnel Management (OPM) on 1-888-767-6738 (Monday through Friday from 7:30 AM to 7:45 PM Eastern Time), or write to:

Office of Personnel Management
Retirement Operations Center
P.O. Box 45
Boyers, PA 16017-0045

to ask for the information you need.

To make payment for military service, ask your personnel office for information.

Credit for Civilian Service

Payment can be made for:

- Any period of creditable civilian service performed before 1989 during which no retirement deductions were withheld from your pay.
- Any period of civilian service during which retirement deductions were withheld from your pay ***and*** refunded to you based on an application you filed before you became covered by FERS.
- Any period of Peace Corps or VISTA volunteer service (excluding training time) regardless of when the service was performed.

Payment cannot be made for:

- Any period of service under FERS for which you received a refund of your retirement deductions based on an application you filed ***after*** you had been covered by FERS.
- Temporary or intermittent service which you performed after 1988. Temporary service means an appointment which is limited to one year or less. Intermittent service means an appointment with no scheduled tour of duty.
- Any other service which is not creditable under FERS.
- Periods of leave without pay.
- Time covered by a lump sum leave payment.

The amount of your payment for civilian service (excluding Peace Corps and VISTA volunteer service) is 1.3 percent of your basic pay for the service, plus interest. The 1.3 percent rate applies regardless of whether deductions would have been taken at that rate, if they had been taken at the time the service was performed. You must pay the total amount due for each separate period of service before you can receive credit for it in your annuity. A separate period of service is a period of civilian service that is not interrupted by a break in service of more than three days.

If you pay for part-time service, you will receive credit for the number of hours in your official tour of duty - e.g., 20 hours per week. If you worked more than your official tour of duty, attach a statement with the name of the agency where you worked, the beginning and ending dates of each period of service, your grade and job title, and the number of hours worked per week. If available, attach copies of any earnings statements which show the number of hours worked.

The amount of your payment for Peace Corps or VISTA volunteer service is the percentage of your basic salary shown below, plus interest.

Dates Service Was Performed	***Payment Rate***
Before 1999	3.00%
During 1999	3.25%
During 2000	3.40%
During 2001 and Later	3.00%

Interest is computed from the midpoint of each period of service included in the computation. Interest accrues annually on the outstanding balance, and is compounded annually until the outstanding balance is deposited. Interest is charged to the date of deposit or the commencing date of annuity, whichever is earlier. *(Interest on PeaceCorps/VISTA service credit deposits begins to accrue on October 1, 1993, or 2 years after the date you first became a Federal employee, whichever is later.)*

Interest is charged at the following rates:

Before 1948	4%
1948 - 1984	3%
1985 - Present	A variable rate determined by the Department of Treasury. The variable rate for any year equals the overall average yield to the fund from retirement securities during the preceding fiscal year.

Payment is optional. You do not have to pay if you do not want to do so. However, if you do not pay for a period of FERS service, you will not receive any credit for it toward retirement, including your eligibility to receive an annuity and computing your average salary.

Payment can be made by -

- You while you are employed by the Federal government and covered by the Federal Employees Retirement System (FERS).
- You when you retire. OPM will automatically compute any amount payable when you retire and give you an opportunity to pay it.
- You, after you leave the Federal government, provided you are eligible for a deferred annuity because you have at least five years of paid civilian service when you leave.
- Your surviving spouse if you die as an employee or separated employee and your spouse is eligible for a survivor annuity benefit. OPM will automatically compute any amount payable and give your spouse an opportunity to pay it.

Payment by you or your spouse must be completed before final processing of retirement or survivor benefits.

Payment cannot be withdrawn unless (1) you become eligible for and obtain a refund of all your FERS retirement deductions, or (2) you retire and are eligible to choose an alternative annuity and lump sum payment of your retirement deductions. If you make payment, and later receive a refund, you ***cannot*** redeposit the money again. This applies to refunds of payments for both civilian and military service. If you do not complete payment for a period of service before your annuity begins, OPM will refund the partial payment, plus interest, at the time of retirement.

Transfer employees who chose to transfer from the Civil Service Retirement System (CSRS) to FERS and who are entitled to have part of their benefits computed under CSRS rules should also use this application to pay for service which will be credited under CSRS rules. OPM will bill you for the appropriate amount. Standard Form 2803, *Application to Make Deposit or Redeposit, Civil Service Retirement System*, contains detailed information on deposits and redeposits under CSRS rules. You can obtain a copy of the SF 2803 from your personnel office. If you have any additional questions regarding credit for service under CSRS rules, your personnel office should be able to help you.

How to Apply and Make Payment

If you are a Federal employee, send your completed application to your department or agency because they must certify it. Please do not file an application if you plan to retire within six months. OPM will give you an opportunity to make payment when it computes your annuity.

If you are not currently a Federal employee, send your completed application directly to:

Office of Personnel Management
Retirement Operations Center
P.O. Box 45
Boyers, PA 16017-0045.

Instructions for making payment, together with a bill for the amount due, will be sent to you as soon as OPM processes your application.

Installment payments of at least $50.00 are acceptable. However, since interest is charged on the unpaid balance, you have to pay additional interest if you make installment payments. You may authorize direct debit payments. You will receive information about authorizing direct debit payments when you receive your account statement.

Additional information and assistance in completing this application may be obtained from your personnel office. If this source of information is not available to you, you can call OPM on 1-888-767-6738 (Monday through Friday from 7:30 AM to 7:45 PM Eastern Time). If you are in local calling distance of Washington, DC, you need to use (202) 606-0500. If you prefer, you can write to:

Office of Personnel Management
Retirement Operations Center
P.O. Box 45
Boyers, PA 16017-0045.

Privacy Act Statement

Title 5, U.S. Code, Chapter 84, authorizes the solicitation of this information. The data you furnish will be used to determine your eligibility to make payments for retirement credit to the Civil Service Retirement Fund.

The information may be shared and is subject to verification via paper, electronic media, or through the use of computer matching programs, with national, state, local or other charitable or social security administrative agencies to determine benefits under their programs. It may also be shared and verified as noted above, with law enforcement agencies when they are investigating a violation of the civil or criminal law.

Public Law 104-134 (April 26, 1996) requires that any person doing business with the Federal government furnish a Social Security Number or tax identification number. This is an amendment to title 31, Section 7701. Failure to do so will delay or prevent action on the retirement application.

Public Burden Statement

We think this form takes an average of 30 minutes per response to complete including the time for reviewing the completed form. Send comments regarding our estimate or any other aspect of this form, including suggestions for reducing completion time, to the Office of Personnel Management, Reports and Forms Coordinator, (3206-0134), Washington, DC, 20415-7900. The OMB number, 3206-0134, is currently valid. OPM may not collect this information, and you are not required to respond, unless this number is displayed.