COURSE SYLLABUS

Federal Employee Retirement Benefits for Administrators: CSRS & FERS Intermediate

Master the rules, regulations, and procedures to effectively counsel federal employees on CSRS, CSRS Offset, and FERS retirement benefits.

Group classes (Washington, DC) and onsite training are available for this course.
For more information, email onsite@graduateschool.edu or visit: https://sdfm.graduateschool.edu/courses/federal-employee-retirement-benefits-for-administrators-csrs-fers-intermediate



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Course Outline

Module 1: Retirement Coverage

- Define covered service
- Identify the types of retirement coverage a federal employee may have
- Distinguish between FERS, FERS RAE and FERS FRAE; understand the rules for CSRS Offset (a version of CSRS), and how benefits are computed when CSRS employees elect the Federal Employees' Retirement System (FERS) coverage
- Determine whether a federal employee will be subject to Social Security coverage
- Apply the 5-year test to determine whether an employee will be automatically covered under FERS
- Use determination tables to identify appropriate retirement coverage

Module 2: CSRS/FERS Creditable Service

- Define creditable service
- Use performance aids to determine what service is creditable for title and computational purposes under CSRS and FERS

Module 3: CSRS/FERS Eligibility for Retirement

- Use performance aids to determine whether an employee meets the age and service requirements for retirement under CSRS
- Use performance aids to determine whether an employee meets the age and service requirements for retirement under FERS

Module 4: CSRS/FERS Annuity Computations

- Compute an employee's length of service
- Compute an employee's high-three average salary
- Compute an estimated CSRS/FERS retirement benefit
- Compute an estimated CSRS/FERS disability retirement benefit
- Explain annuity commencing dates and cost-of-living adjustments (COLAs)

Module 5: Survivor Benefits

- Identify who may be eligible to receive a survivor benefit under CSRS and FERS
- Explain the types of benefits for survivors of deceased federal employees under CSRS and FERS
- Identify the types of survivor benefit elections that can be made by CSRS and FERS employees at retirement
- Explain the types of benefits for survivors of deceased federal retirees under CSRS and FERS
- Describe how court-ordered survivor annuities can affect survivor benefit elections made by retiring employees under CSRS and FERS
- Using performance aids, explain the following:
  - Agency procedures to follow when a CSRS employee dies
  - Agency procedures to follow when a former CSRS employee dies
  - Agency procedures to follow when a CSRS annuitant dies
  - Effects of survivor annuity for non-deduction & refunded service

Module 6: Federal Employee Health Benefits and Federal Long-Term Care Insurance

- Explain retiree aspects of FEHB and Federal Long-Term Care program
- Explain eligibility requirements to continue FEHB coverage into retirement
- Identify steps to process FEHB forms at time of retirement

Module 7: Federal Employees' Group Life Insurance (FEGLI)

- Explain the retiree aspects of FEGLI
- Explain the eligibility requirements to continue FEGLI coverage into retirement
- Identify agency actions to take in processing a retiree's FEGLI coverage
- Explain the changes in FEGLI coverage after retirement

Module 8: Social Security and Medicare Benefits

- Identify the components of the Social Security Benefits Program
- Explain the eligibility requirements to receive Social Security retirement benefits and family benefits
- Describe how the Social Security benefit is computed
- Explain how Social Security retirement benefits and family benefits coordinate with CSRS and FERS benefits
- Identify components of the Medicare program

Module 9: Retirement Application Process

- Identify procedures employee must follow to file an application for nondisability retirement and disability retirement under CSRS/FERS
- Identify procedures agency must follow to process applications for nondisability retirement and disability retirement under CSRS/FERS

Module 10: Thrift Savings Plan (TSP)

- Identify important aspects of the Thrift Savings Plan
- Identify steps a CSRS and FERS employee may take to manage their account