

**National Guard
Integrated Definition (IDEF) Model/Task Listing**

BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES								
TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
<i>B-01</i>	<i>DEATH CASES - GENERAL TASKS</i>							
B-01.01	Receives notification of death			x				
B-01.02	Notify ABC-C of death via entry in BATS-R with Next of Kin information and Date of Death			x				
B-01.03	Forwards notification of death to OPM/DFAS					x		
B-01.04	Initiate RPA and forward to ABC-C inbox in DCPDS/notify CSR			x				
B-01.05	Forward OPF to ABC-C			x				
B-01.06	Process NPA SF 50 and place in OPF					x		
B.01.07	Prepare beneficiary benefit package and send all applicable forms to survivor					x		
B-01.08	Contact and provide counseling and assistance with completion of beneficiary forms					x		
B-01.09	Notifies beneficiary of entitlements					x		
B-01.10	If FERS, provide the surviving spouse or qualified former spouse with payment options for death benefits and rollover information					x		
B.01.11	Submit completed claim forms and ensure all necessary documents are attached and send to ABC-C.						Survivor	
B-01.12	Distributes beneficiary package to appropriate agencies (DFAS, FEGLI,OPM, ETC)					x		
B-01.13	Completes final counseling with survivor regarding benefit entitlements and future payment expectations and processes with OPM					x		
B-01.14	File benefits forms copies in OPF and return OPF to HRO. Send copy and completed package to survivors.					x		Retain documents with original signatures in local file. Suspense for removal in 1 year
B-01.15	Send OPF to National Record Center			x				

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<i>B-02</i>	<i>DISABILITY RETIREMENT - PRELIMINARY</i>							
B-02.01	Receives notification of a pending medical retirement request			x				
B-02.02	Issues HRO letter of 30 day notice of termination to dual status technicians.			x				PL 97-253 eligible ONLY
B-02.03	Completes National Guard disability waiver			x				PL 97-253 eligible ONLY
B-02.04	Review potential retiree OPF/eOPF			x				
B-02.05	Meet with retiree and assist with down loading and completing retirement, medical and disability forms to include 3112 A,B,C,D, and forward OPF and disability retirement package to ABC-C. Discuss SSN and Fedmer. Contact ABC-C for assistance	x	x	x				To include SF2801 or SF3107, FEDMER Form, SSA Submission, Receipt or Award Notice
B-02.06	Check for creditable deposits			x		x		OPM (Civilian) and DFAS (Military)
B-02.07	Checks eligibility for continuation of life insurance into retirement			x		x		
B-02.08	Checks eligibility for continuation of health insurance into retirement			x		x		
B-02.09	Include Special Provision Disability cover sheet for OPM			x		x		
B-02.10	Receive OPF and retirement packet. Log into database for progress tracking in BATS and SQL					x		
B-02.11	Complete preliminary process and provide estimate calculation and preliminary letter of instructions to employee to include GRB annuity estimate. Place copies of benefit forms in OPF						x	

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B-02.12	Completes retiree's certified summary of federal service and forward with disability packet to DFAS					x		
B-02.13	Submits retirement packet to DFAS and conduct monthly inquiries to OPM for current status. Returns OPF to HRO					x		
<i>B-03</i>	<i>DISABILITY RETIREMENT CASES - FINAL PACKET</i>							
B-03.01	Informs employee HRO office and obtains the effective date.					x		
B-03.02	Notify HRO once disallowance/approval is received; request submission of and process RPA. Forward copy of approval and/or disallowance to the HRO					x		If approval is received by employee or HRO, notify ABC-C.
B-03.03	Initiate RPA and forward to ABC-C inbox in DCPDS. Notify ABC-C of LDOP via email			x				
B-03.04	Process NPA SF 50, email SF2821 and SF2819 to HRO / File OPM Notice in OPF/eOPF					x		
B-03.05	Assemble final packet including final SF 50 and send to retiree. Conduct final counseling					x		
B-03.06	Complete final packet and forward to DFAS					x		
B-03.07	Fax or Email SF 50 and LDOP to OPM					x		LDOP@opm.gov or 202-606-1686
<i>B-04</i>	<i>DISABILITY RETIREMENT CASE - FINAL DISAPPROVAL</i>							
B-04.01	Notify HRO					x		Regular Disability - NOT PL 97-253
B-04.02	File copy of OPM disapproval letter in OPF/eOPF			x				
B-04.03	HRO will inform management			x				

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B-05	<i>DISCONTINUED SERVICE RETIREMENT GENERAL TASKS</i>						
B-05.01	Receives notification of an involuntary loss of military membership of a dual status technician			x			
B-05.02	Issues HRO letter of 30 day notice of termination to dual status technicians			x			
B-05.03	Reviews potential retiree OPF/eOPF, estimate, check FEHB/FEGLI			x			Process FEHB Waier Request if applicable (PL 99-251)
B-05.04	Completes certification of agency offer of position (OPM1510)			x			
B-05.05	Meet with retiree and assist with down loading and completing retirement forms and forward OPF and retirement package to ABC-C		x	x			
B-05.06	Submit RPA to ABC-C inbox for processing			x			
B-05.07	ABC-C receives OPF and retirement packet. Inputs retirement into the ABC-C database for tracking in Benefits Automated Tracking System (BATS)					x	
B-05.08	Complete final computation/processing of DSR; call retiree for final retirement counseling.					x	
B-05.09	Process NPA and forward to DFAS					x	
B-05.10	Send retiree notification letter , benefit forms, certified summary, OPM post retirement information and final retirement SF-50					x	
B-05.11	File copies in OPF and return OPF to HRO					x	
B-06	<i>FEGLI (FEDERAL EMPLOYEES GROUP LIFE INSURANCE) - GENERAL TASKS</i>						

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B-06.01	Provide advisory services			x		x		
B-06.02	Coordinate with DFAS to resolve problems			x		x		
B-06.03	Initiate actions to correct agency errors			x		x		
B-06.04	Notify employees of discovered FEGLI errors (i.e., e-mail, notes, faxes, letters, etc.)			x		x		
B-06.05	Determine eligibility for additional FEGLI			x		x		
B-06.06	Assist employee with making election or change using automated systems			x		x		
B-06.07	Determine whether employees' reasons for submitting late elections for optional (within 6 months) were due to "causes beyond their control" and notify ABC for reason late election					x	NGB Approval	
B-06.08	Prepare and attach a memorandum to the SF 2817, indicating reasons for accepting late elections. Notify employee of acceptance.					x		
B-06.09	Annotate the SF 2817 with the determination that this is a valid election					x		
B-06.10	If employee is ineligible for coverage or making a change, send employee an official "initial decision" with reconsideration rights to NGB.					x		
B-06.11	Process any late actions					x		
B-06.12	Download and file original on right side of OPF/eOPF			x				
B-06.13	Certify eligibility by signing the SF 2817 as the "authorized agency official" for other than in-processing			x		x		
B-06.14	Conduct periodic audits to detect potentially erroneous FEGLI coverage			x		x		

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B-06.15	Complete SF 2821/2819 promptly following termination			x				
B-06.16	Send original and duplicate of the SF 2821 to employee or assignee, along with a complete SF 2819 within 3 days of receipt of RPA			x				
B-06.17	Verify, certify and date stamp SF 2823 designation of beneficiary forms and place in OPF/eOPF.			x				Retain original form in file with 1 year suspense for destruction
B-06.18	If insurance is assigned, accept only assignee's designation of beneficiary form			x				
B-06.19	Refer questionable beneficiary forms to OFEGLI			x		x		
<i>B-07</i>	<i>FEGLI - NON QLE SF 2822 ACTION</i>							
B-07.01	Upon receipt of SF 2822, obtain information to review for accuracy and enter ABC-C address: ABC-C 303 Marshal Ave. Fort Riley, KS 66442			x				Verify pay and duty status
B-07.02	Upon receipt from OFEGLI ABC-C will process accordingly.					x		If not in pay and duty status within 60 days of approval, VOID FEGLI approval, SF2822
<i>B-08</i>	<i>FEGLI - ASSIGNMENTS</i>							
B-08.01	Research OPM website and download forms		x	x				Review RI76-21, RI76-26, RI76-10
B-08.02	Obtain assistance from ABC-C or HRO		x					
B-08.03	Counsel employees		x	x		x		Irrevocalbe Assignment
B-08.04	Complete and send assignment forms to NG/HR		x					

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B-08.05	Receive, verify and file assignment form in OPF/eOPF			x				Certify receipt of form. Issue each assignee a copy with blank SF2823 and RI76-21 with address for submission. RI76-10	
B-08.06	Notify employee of effective date of assignment			x				Date of HRO Receipt	
B-08.07	Verify employee has not elected a living benefit			x					
B-08.08	Obtain and file the current address of assignees			x				OPF or equivalent	
B-08.09	If technician separates, Remark B69 on SF50			x				Hanbook page 184	
B-09	FEGLI - DISMEMBERMENT CLAIMS								
B-09.01	Notify supervisor of injury		x					Representative of employee may notify	
B-09.02	Notify NG HR Office of dismemberment	x							
B-09.03	If notified, inform NG HR office and ABC-C of injury	x		x		x	OWCP ICPA	Ensure not compensation (OWCP or OPM). If OWCP, notify ICPA	
B-09.04	If notified, inform management and ABC-C of the injury	x		x					
B-09.05	Provide written notification of accident to the Office of Federal Employees' Group Life Insurance (OFEGLI) at P.O. Box 2627, Jersey City, NJ 07303-2627 within 20 days of accident		x	x				OFEGLI, PO Box 6080, Scranton, PA 18505-6080 or Fax 570-558-8659 within 1 year of loss. Handbook page 202 and BAL 05-201	
B-09.06	Obtain Claim for Accidental Means Dismemberment Benefit form (FE-7), from OPM website and complete Part A; provide part C to attending physician to compete		x						
B-09.07	Contact employee or representative, assist with completion of FE-7 and provide counseling			x		x			

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B-09.08	Forward completed form to ABC-C			x				
B-09.09	Complete part B of FE-7 with 24 hours of receipt; forward to OFGLI					x		OFGLI, PO Box 6080, Scranton, PA 18505-6080
B-09.10	Contact OFGLI to ensure notification of dismemberment has been received					x		1-800-633-4542
<i>B-10</i>	<i>FEGLI - LEAVE WITHOUT PAY/ NON USERRA</i>							
B-10.01	If approving LWOP for greater than 30 days, initiate RPA and issue LWOP checklist	x		x				
B-10.02	Counsel employees on effects of LWOP			x				
B-10.03	Monitor suspense date and terminate after 12 months with Termination FEGLI NPA			x				
B-10.04	Complete Notice of Conversion Privilege (SF 2819) and Agency Certification of Insurance Status (SF 2821), and mail to employee			x				Within 3 days of receipt of RPA
<i>B-11</i>	<i>FEGLI - LIVING BENEFITS</i>							
B-11.01	Counsel on requirements and refer employees to OFGLI			x		x		OFGLI 1-800-633-4542 Handbook page 189
B-11.02	Upon receipt of FE-8A from OFGLI, certify salary, coverage, etc.					x		
B-11.03	Remedy FE-8A to DFAS and mail original to OFGLI					x		OFGLI, PO Box 6080, Scranton, PA 18505-6080
B-11.04	Upon receipt of FE-8C (Explanation of Benefits) from OFGLI, prepare NPA with appropriate remarks and forward to DFAS					x		
B-11.05	File the FE-8C in OPF/eOPF. Initiate and approve RPA for Election of Living Benefits (full or partial) in DCPDS					x		See GPPA Chapter 22, page 22-5, Table 22-A, Rule 2 & 3

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B-11.06	Forward FE-8C to OPM with other documentation at time employee retires					x		
<i>B-12</i>	<i>FEGLI - NEW HIRES/NEWLY ELIGIBLE</i>							
B-12.01	Code DCPDS with Optional Eligibility Expiration date			x				
B-12.02	Conduct written follow-up prior to election deadline; ensure new employees are informed that Basic is automatic (unless an unexpired waiver exists) and options are voluntary			x				
B-12.03	Provide new employees SF 2817, FEGLI Booklet, RI 76-21 (pre-appointment packet)			x				
B-12.04	Provide advisory services			x		x		
B-12.05	Input SF-2817 information, if received at in-processing, and generate NPA, if necessary			x				Retain original SF2817 in local file. Suspense 1 year for removal
B-12.06	Assist employee with making election or change using EBIS			x		x		
<i>B-13</i>	<i>FEGLI - OPEN ENROLLMENT PERIODS</i>							
B-13.01	Obtain open season information from ABC-C & OPM Websites; complete electronic elections via EBIS		x					
<i>B-14</i>	<i>FEGLI - REEMPLOYED ANNUITANTS</i>							
B-14.01	Ask applicant if they are receiving annuity payments			x				

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B-14.02	Notify OPM that a reemployed annuitant is hired for coordination of coverage			x			Job Aid #5 Ch.100 CSRS/FERS, send with SF50 and OPM 1482 (if election is made) to OPM
B-14.03	Counsel/assist employee			x		x	
B-14.04	Make FEGLI election using ABC-C automated system EBIS		x				
B-14.05	If employee elects FEGLI, print SF 2817 and send to OPM or HR Office to file, as appropriate			x			
B-14.06	When employment terminates, send photocopies to OPM of all SF 2817s filed during reemployment			x			
B-15	<i>FEGLI - SEPARATIONS (other than Deaths and Retirements)</i>						
B-15.01	Notify of intent to separate		x				
B-15.02	Counsel individual, upon request			x		x	
B-15.03	Send necessary forms to employee			x			
B-15.04	Complete Notice of Conversion Privilege (SF 2819) and Agency Certification of Insurance Status (SF 2821), and mail to employee			x			within 3 days of NPA
B-16	<i>FEGLI - TRANSFERS</i>						
B-16.01	Transfer-in existing FEGLI coverage (do not code as new employee)			x			
B-17	<i>FEHB (FEDERAL EMPLOYEES HEALTH BENEFITS PROGRAM) - GENERAL TASKS</i>						
B-17.01	Provide advisory services.			x		x	
B-17.02	Provide New Health Insurance marketplace Coverage Options information sheet			x			www.healthcare.gov
B-17.03	Coordinate actions to resolve problems			x		x	

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B-17.04	Assist employees with health carrier issues; i.e., carrier cancels coverage for no apparent reason			x		x		
B-17.05	Assist employees with health benefit changes using automated systems			x		x		
B-17.06	Notify employee when health carrier drops out of the FEHB program or if coverage area changes		x	x		x	Health Insurance Carrier	
B-17.07	Conduct periodic audits to detect potentially erroneous FEHB coverage			x		x		
B-17.08	Submit SF 2809 during in-processing or make election through ABC-C automated system		x	x				
B-17.09	If employee is ineligible for FEHB enrollment or change to enrollment, provide employee with an official "initial decision" with reconsideration rights to NGB					x		If ineligible, provide Health Insurance Marketplace coverage options Info Sheet www.healthcare.gov
B-17.10	Determine whether reasons for late elections were due to "causes beyond employee's control"			x		x		
B-17.11	Annotate the SF 2809 with the determination that this is a valid late election or belated open season election					x		
B-17.12	Obtain assistance/guidance from NGB for general questions.			x		x		
B-18	FEHB - LEAVE WITHOUT PAY/ NON USERRA							
B-18.01	For LWOP of more than 30 days, initiate RPA and issue LWOP checklist			x				

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B-18.02	Counsel employees on effects of LWOP and the option to continue, cancel or terminate coverage upon employee request			x				
B-18.03	Review OPM Healthcare Reference: Leave Without Pay Status and Insufficient Pay		x					
B-18.04	Complete election form/checklist and return to HRO to validate election of FEHB options while in a non-pay status		x					
B-18.05	Monitor suspense date and terminate if election not received within 31 days			x				Terminate enrollment at end of pay period
B-18.06	Monitor for 4-month rule and 365th day termination at end of pay period			x				
B-18.07	For termination of coverage, prepare and distribute SF2810, and file in OPF/eOPF. Until electronic SF2810, file in OPF/eOPF. Retain original 1 year in HRO file			x				Upon RTD, prepare and distribute SF2810 to reinstate
B-19	<i>FEHB - NEW HIRES/NEWLY ELIGIBLE</i>							
B-19.01	Code DCPDS with Election Expiration Date, if applicable			x				
B-19.02	Advise employee to go to OPM website for appropriate FEHB information and New Health Insurance Marketplace information	x		x				www.opm.gov/healthcare-insurance www.healthcare.gov
B-19.03	Counsel employees on eligibility to enroll, enrollment events, 5 year requirement/waivers, and where to review FEHB plan brochures and New Health Insurance Marketplace information			x		x		
B-19.04	Provide New Health Insurance Marketplace Coverage Options Notice			x				

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B-19.05	Input SF-2809 information, if received at in-processing, and distribute forms			x				
B-19.06	Explain to new employee how to access EBIS to establish PIN and make automated election	x		x		x		
B-19.07	Make FEHB electronic election via EBIS		x					If employee is unable to electronically submit election, contact ABC-C for assistance.
B-19.08	Suspense action for 60days to allow employee opportunity to waive Premium Conversion			x				
B-19.09	Premium Conversion Waiver completed, submit Waiver to DFAS via remedy. File waiver in OPF/eOPF - retain original 1 year in HRO file			x				
B-19.10	Pull suspense report and remind employee of election opportunity and non-election			x				
B-19.11	If employee fails to elect within 60 days, prepare SF2809 and file in OPF/eOPF - retain original for 1 year in HRO file			x				Remark: Technician failed to make election after Inbrief dated "" and Reminder on ""
<i>B-20</i>	<i>FEHB - OPEN ENROLLMENT PERIODS</i>							
B-20.01	Obtain open season information from ABC-C and OPM websites; complete electronic elections via EBIS		x					
<i>B-21</i>	<i>FEHB - REEMPLOYED ANNUITANTS</i>							
B-21.01	Counsel/assist employees			x		x		
B-21.02	If annuity continues, notify OPM of re-employment			x				Submit JOB AID #5 and SF50 to OPM upon reemployment. If enrolled in FEHB, HBPremiums@opm.gov

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B-21.03	If participating in Premium Conversion, upon receipt of confirmation and current FEHB enrollment code, transfer in FEHB as of the re-employment date			x				
B-21.04	Suspense action for 60 days to allow employee opportunity to waive Premium Conversion			x				
B-21.05	If Premium Conversion waived notify OPM			x				
B-21.06	Notify OPM at HQ and forward hard copy of waiver to OPM			x				OPM, Retirement Operations Center, P.O. Box 45, Boyers, PA 16017
B-21.07	If annuity terminates, provide eligible employee opportunity to elect FEHB coverage and provide New Health Insurance Marketplace Notice. Notify retirement system and transfer in enrollment			x				HBPremiums@opm.gov
B-21.08	When employment terminates, and annuity was not terminated, determine eligibility to continue FEHB and direct employee to ABC-C for counseling			x				
B-21.09	Upon termination of employment, if annuity was terminated, complete SF2810 and issue TCC notice			x				New TCC procedures beginning 1 September 2014. BAL 14-204
B-21.10	Notify OPM and forward all copies to OPM			x				
B-21.11	Counsel employee regarding continuation of health coverage and options			x		x		
B-21.12	Transfer in FEHB and deduct premiums on day following effective date of separation; notify annuitant and health carrier that OPM will maintain FEHB enrollment						OPM	

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<i>B-22</i>	<i>FEHB - SEPARATIONS (other than deaths and retirements)</i>							
B-22.01	Counsel/assist employees with benefit information regarding postponed and deferred annuity impact for FEHB			x		x		
B-22.02	Complete SF2810 and issue TCC notice to employee upon separation			x				Electronic SF2810 procedures to be implemented per BAL 12-206
<i>B-23</i>	<i>FEHB - TEMPORARY CONTINUATION OF COVERAGE/SPOUSE EQUITY ACT</i>							
B-23.01	Notify family member of rights to TCC, counsel on Spouse Equity Act, refer to ABC-C			x				1-866-792-7620 / 785-239-0045 VERIFY telephone number
B-23.02	Receive OPM proof of eligiblity and application to enroll			x				
B-22.03	Obtain signature on required Certification Notice			x				
B-23.04	Verify eligibility and request additional documents if necessary			x				
B-23.05	Process and send enrollment SF2809 to National Finance Center			x				New procedures 1 September 2014 per BAL 14-204
B-23.06	Return enrollee copy to enrollee, file copy of SF 2809 in TCC folder or file			x				
B-23.07	Maintain Spouse Health Benefits File			x				
<i>B-24</i>	<i>FEHB - TRANSFERS</i>							

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B-24.01	Transfer-in existing FEHB coverage, do not code as new employee; and ensure FEHB is coded in DCPDS/DCPS; issues SF 2810 if agency and/or payroll office changes. File SF 2810 in OPF/eOPF - retain original for 1 year in HRO file			x				Electronic SF2810 procedures to be implemented per BAL 12-206
B-25	FEHB - CORRECTION OF INFORMATION ON FORMS							
B-25.01	SF2809/SF2810 Clearly labeled as "CORRECTION"			x				Electronic SF2810 procedures to be implemented per BAL 12-206
B-25.02	Complete Identifying Data			x				
B-25.03	Complete ONLY Specific Data to be changed			x				
B-25.04	Reason and date of change in Remarks			x				
B-25.05	Submit to Carrier			x				
B-26	FEHB - CHILD EQUITY COURT/ADMINISTRATIVE ORDERS							
B-26.01	Receive Court/Administrative Order			x				
B-26.02	Review record for FEHB eligibility and enrollment			x				
B-26.03	Notify individual of court/administrative order received			x				
B-26.04	If enrolled, review coverage for appropriateness, and change enrollment as required			x				
B-26.05	If not enrolled in FEHB, request documentation of other coverage			x				
B-26.06	If no enrollment or proof of other coverage, enroll in BCBS 112			x				
B-26.07	If inappropriate change to coverage, VOID coverage and enroll in BCBS 112			x				
B-26.08	Notify issuer of the order of health benefit coverage			x				

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		MGR	EMPL	HRO	NGB	ABC-C	
B-26.09	Send SF2809 and court/Administrative order to the carrier			x			
B-26.10	File order and SF 2809 in OPF/eOPF. eOPF - maintain original documents 1 year in HRO file			x			
B-27	COVERAGE OF CHILDREN OF SAME-SEX DOMESTIC PARTNERS						
B-27.01	Receive Declaration of Domestic Partnership (DG78)			x			
B-27.02	Determine eligibility and notify employee			x			
B-27.03	Receive Tax Certification (DG86)			x			
B-27.04	File Declaration of Domestic Partnership and Tax Certification in OPF/eOPF. eOPF - Retain original documents 1 year in HRO file			x			
B-27.05	New enrollments suspense for SF2809 submission within 60 days of receipt of Declaration (DG78)			x			
B-27.06	Enter required remarks on SF2809. Process SF2809 in DCPDS. Effective Date, first day of the pay period that includes the day employing office receives the DG78. Distribute to FEHB Carrier			x			
B-27.07	Process SF2809 with Payroll (DFAS/Remedy) if the Child is NOT a tax dependent or Tax Certification is not submitted			x			
B-27.08	File SF2809 in OPF/eOPF. eOPF - Retain original for 1 year in HRO file			x			
B-27.09	Change of enrollments Suspense for SF2809 submission within 60 days of receipt of Declaration (DG78)			x			

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES							
TASK #		TASK OWNERS					OTHER TASK OWNER
		MGR	EMPL	HRO	NGB	ABC-C	
B-27.10	Enter required remarks on SF2809. Process SF2809 in DCPDS. Effective Date, first day of the pay period that includes the day employing office receives the DG78. Distribute to FEHB Carrier			x			
B-27.11	Process SF2809 with Payroll (DFAS/Remedy) if the Child is NOT a tax dependent or Tax Certification is not submitted			x			
B-27.12	Add eligible family member to Self and Family FEHB. Covered the beginning of the pay period in which the Declaration is submitted.			x			
B-27.13	Complete paper SF2809. Enter required remarks. Submit to Carrier.			x			
B-27.14	Process SF2809 with Payroll (DFAS/Remedy) if the Child is NOT a tax dependent or Tax Certification is not submitted			x			
B-27.15	File SF2809 in OPF/eOPF. eOPF - Retain original for 1 year in HRO file			x			
B-27.16	Coverage of a child who in NOW a tax dependent or no longer meets requirements of coverage. Notified by employee within 30 days of event.			x			
B-27.17	TAX DEPENDENT. Complete paper SF2809. Enter required remarks. Submit to PAYROLL ONLY (DFAS/Remedy).			x			
B-27.18	REMOVE CHILD who was NOT a Tax Dependent. Complete paper SF2809. Enter required remarks. Submit to BOTH Payroll (DFAS/Remedy) and Carrier			x			

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TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
B-27.19	TCC enrollees, if eligible, can provide coverage for newly eligible stepchildren. They may contact the NFC			x				New TCC procedures beginning 1 September 2014. BAL 14-204 1-800-242-9630 or nfc.dprs@usda.gov
<i>B-28</i>	<i>REEMPLOYED ANNUITANT CASES</i>							
B-28.01	Ask applicant if they are receiving annuity payments			x				
B-28.02	If disability annuitant, indicate whether OPM has found him/her recovered						Applicant	
B-28.03	Advise annuitant, in writing, of the effects of reemployment			x				
B-28.04	Counsel annuitant, as necessary			x		x		
B-28.05	Send notification (see Job Aid # 5, Chapter 100 CSRS/FERS Handbook) and SF 50 to OPM			x				
B-28.06	Complete OPM Form 1482 (FEGLI)			x				
B-28.07	Notify supervisor of intent to separate		x					
B-28.08	Give installation out-processing checklist to employee	x						
B-28.09	Complete SF2801 or SF 3107 and forward to ABC		x	x				If applicable
B-28.10	Initiate separation process			x				
B-28.11	Send photocopies of all SF 2817 filed during reemployment to retirement system			x				
B-28.12	If claim for accidental death or dismemberment (ADD) is received, send it to OFEGLI			x				See B-09 FEGLI Dismemberment Claims
<i>B-29</i>	<i>RETIREMENT - CONTRIBUTION REFUNDS</i>							
B-29.01	Provide NPA with SF2802/3106 and refund fact sheet to employee			x				

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES								
TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
B-29.02	Complete form, mail to HRO within 30 days of separation		x					
B-29.03	If refund request received within 30 days, complete agency portion of form and mail to DFAS			x				
B-29.04	If unable to meet 30 day suspense, mail form to OPM		x					
B-29.05	If refund request received after 30 days, do not date stamp or complete agency portion of form; mail form direct to OPM			x				
B-30	RETIREMENT - DEPOSITS/REDEPOSITS							
B-30.01	Provide advisory services			x		x		
B-30.02	Obtain SF 2803 or SF 3108 from www.opm.gov/forms or www.abc.army.mil		x					
B-30.03	Complete SF2803 or SF3108 form and mail/fax to ABC-C with OPF		x	x				785-240-6153/ 785-239-6228
B-30.04	Provide information requested by ABC-C to certify form			x				
B-30.05	Complete verification of service, certify SF2803 or SF3108, mail/email to OPM					x		scbillings@opm.gov
B-30.06	Make payments to OPM upon receipt of OPM approval letter		x					
B-30.07	Provide employee with receipt of payments						OPM	
B-30.08	Retain OPM receipt of payment		x					
B-31	RETIREMENT - MILITARY DEPOSIT NON USERRA							
B-31.01	Provide advisory services			x		x		
B-31.02	Obtain application forms from ABC-C website		x	x				

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES								
TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
B-31.03	Request military earnings from appropriate military finance office		x	x				
B-31.04	Upon receipt of military earnings, complete SF2803 or 3108 and send to ABC-C with OPF			x				
B-31.05	Complete estimate for military deposit					x		
B-31.06	Review application for accuracy; send to DFAS, via remedy and file copy of package with estimate on the left side of OPF/eOPF					x		
B-31.07	Make arrangement with DFAS to pay deposit		x					If payroll deductions, contact HRO
B-31.08	Provide employee with receipt of payments						DFAS	
B-31.09	When paid in full, send copy of OPM form 1514/ Paid in Full letter to HRO for filing in OPF/eOPF		x					Contact HRO to submit remedy for receipt
B-31.10	Retain DFAS receipt of payment		x					
B-31.11	File payment receipt on right side of OPF/eOPF and purge application package from OPF/eOPF			x				
B-32	RETIREMENT - VOLUNTARY CONTRIBUTIONS (CSRS ONLY)							
B-32.01	If contacted, refer employee to ABC-C			x				
B-32.02	Obtain SF2804 from ABC-C		x					
B-32.03	Complete SF2804, mail to ABC-C		x					
B-32.04	Certify SF2804, mail to OPM					x		
B-32.05	Make payments to OPM upon receipt of OPM approval letter		x					
B-32.06	Provide employee with receipt of payments						OPM/DFAS	
B-33	SEPARATION CASES - DEFERRED ANNUITIES							
B-33.01	Express intent to resign/separate to supervisor		x					
B-33.02	Initiate RPA for employee	x		x				

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES								
TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
B-33.03	Counsel employee upon request, providing information on impact of FERS/CSRS refunds, TCC (if appropriate)			x		x		New TCC procedures 1 Septemeber 2014 per BAL 14-204
B-33.04	Verify that employee is ineligible for an immediate annuity within 30 days			x				
B-33.05	Complete SF 2810 (FEHB), SF 2821 (FEGLI) and SF 2819 (FEGLI)			x				Electronic SF2810 procedures to be implemented per BAL 12-206
B-33.06	Process and disseminate NPA, along with the refund fact sheet, refund form, rollover information to employee			x				
B-33.07	Review and closeout OPF/eOPF			x				
B-34	TSP (THRIFT SAVINGS PLAN) - GENERAL TASKS							
B-34.01	Provide advisory services			x		x		
B-34.02	Assist employee with making elections / changes using automated systems			x		x		
B-34.03	Conduct periodic audits to detect potentially erroneous TSP coverage			x		x		
B-34.04	Coordinate with payroll (DFAS) and HRO to resolve problems			x		x		If HRO finds a problem, contact ABC-C
B-34.05	Initiate action to correct agency errors			x		x		
B-34.06	Notify employees of corrective actions			x		x		
B-34.07	Refer questionable cases to the Thrift Investment Board and NG			x		x		
B-35	TSP - CATCH-UP CONTRIBUTIONS							
B-35.01	Submit election form through the ABC-C via EBIS		x					

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES							
TASK #		TASK OWNERS					OTHER TASK OWNER
		MGR	EMPL	HRO	NGB	ABC-C	
B-35.02	Answer employees questions regarding TSP catch-ups			x		x	
B-36	TSP - NEW HIRE/NEWLY ELIGIBLE						
B-36.01	Code Automatic contribution via DCPDS and process opt-out			x			
B-36.02	Provide counseling			x		x	
B-37	TSP - RETIREMENTS/ SEPARATIONS						
B-37.01	Includes TSP Withdrawal Information in separation packet			x		x	
B-38	USERRA ACTIONS FEHB,TSP,FEGLI, FLTC, FSA, FEDVIP, MILITARY DEPOSITS						
B-38.01	Absent-US						
B-38.01a	Complete USERRA Checklist and submit to HRO for uniformed service over 30 days		x				
B-38.01b	Counsel employees on USERRA rights and entitlements			x			
B-38.01c	Process RPA for Absent-US			x			
B-38.01d	If member elects to terminate FEHB coverage, prepare and distribute SF2810			x			Electronic SF2810 procedures to be implemented per BAL 12-206
B-38.01e	If member elects to cancel FEHB due to Early Tricare, contact ABC-C for cancellation		x				Within 60 days of Tricare start date
B-38.01f	Process FEGLI Election			x			
B-38.01g	Process NGAUS Election			x			
B-38.01h	Send TSP-41 to TSP			x			
B-38.02	Return to Duty from Absent-US and Separation-US						

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES								
TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
B-38.02a	Complete USERRA Checklist and submit to HRO			x				
B-38.02b	Counsel employees on USERRA rights and entitlements			x				
B-38.02c	Process RPA for RTD			x				
B-38.02d	If FEHB was terminated, prepare and distribute SF2810 for reinstatement			x				Electronic SF2810 procedures to be implemented per BAL 12-206
B-38.02e	If FEHB was cancelled, reenroll through EBIS		x					within 60 days of RTD or upto 31 days prior to and 60 days after loss of Tricare
B-38.02f	Process FEGLI Election			x				
B-38.02g	Process NGAUS Election			x				
B-38.02h	Submit military LES' if appropriate for matching contributions		x					
B-38.02i	Process Remedy ticket for Agency Automatic 1% TSP Contributions			x				
B-38.02j	Send TSP-41 to TSP			x				
B-38.02k	Verify eligibility for Reservist Differential(RD)			x				
B-38.02l	Calculate the RD payment			x				
B-38.02m	Submit Remedy ticket to DFAS for RD Payment			x				
B-38.02n	Send DD 214 or equivalent document to HRO verifying honorable service		x					
B-38.02p	Military Deposit							
B-38.02p.01	Submit RI 20-97 with DD 214 to DFAS		x	x				
B-38.02p.02	Send Complete RI 20-97 once received from DFAS to HRO		x					
B-38.02p.03	Calculate the military deposit			x				
B-38.02p.04	Submit a Remedy ticket to DFAS for military deposit election			x				
B-38.03	Separation - Uniformed Services							

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES							
TASK #		TASK OWNERS					OTHER TASK OWNER
		MGR	EMPL	HRO	NGB	ABC-C	
B-38.03a	Complete USERRA Checklist and submit to HRO for uniformed service over 30 days		x				
B-38.03b	Counsel employees on USERRA rights and entitlements			x			
B-38.03c	Process RPA for Separation-US			x			
B-38.03d	If member elects to terminate FEHB coverage, prepare and distribute SF2810			x			Electronic SF2810 procedures to be implemented per BAL 14-204
B-38.03e	If FEHB was cancelled, reenroll through EBIS		x				
B-39	<i>VOLUNTARY RETIREMENT - GENERAL TASKS</i>						
B-39.01	Submit RPA or appropriate documentation to process award, CLG, or correction action prior to employee's retirement.			x			
B-39.02	Educate supervisors about the need to submit timely RPAs and remind employees to submit timely packages to ABC-C			x			Recommended submission time 90-120 days prior to retirement
B-39.03	File copies of approvals for firefighter, law enforcement, and air traffic controller retirement coverage in OPF/eOPF			x			
B-39.04	Direct employee to EBIS to obtain quick personal annuity estimate. Recommend if within 5 years of retirement, request ABC-C do the calculation.			x		x	
B-39.05	ABC-C will compute the estimate and forward to employee					x	
B-39.06	Coordinate with DFAS and/or HRO to resolve TSP, FEGLI, FEHB, and SCD, etc., issues					x	

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BENEFITS, ENTITLEMENTS AND TECHNICAL SERVICES								
TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
<i>B-40</i>	<i>VOLUNTARY RETIREMENT CASES - APPLICATION PROCESS</i>							
B-40.01	Notify supervisor of plans to retire		x					Submit SF52
B-40.02	Obtain necessary forms from ABC-C website		x					
B-40.03	Answer employees' questions and assist in completing necessary forms			x		x		
B-40.04	Complete and return application with appropriate forms to ABC-C		x	x				Recommended submission time 90-120 days prior to retirement
B-40.05	If less than 6 months before separation date, attach and forward SF 2803/3108 with retirement packet (civilian deposit/redeposit)		x	x		x		
B-40.06	Request OPF from HRO to verify the accuracy of retirement information					x		until eOPF is implemented
B-40.07	Input timeliness element showing when complete application was received					x		Can be viewed through BATS
B-40.08	Receive application and perform quality control review using audit form					x		
B-40.09	Request DFAS verify completion of military deposit					x		
B-40.10	Complete and provide employee with retirement estimate					x		
B-40.11	Provide employee with a copy of "Where and How to Direct Questions to OPM"; caution against contacting OPM until the employee is notified the application was forwarded. Explain how the retirement is processed by personnel, DFAS and OPM.			x		x		
B-40.12	Complete agency checklist					x		

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TASK #		TASK OWNERS					OTHER TASK OWNER	
		MGR	EMPL	HRO	NGB	ABC-C		
B-40.13	Assemble the application packet IAW OPM guidance and forward to DFAS					x		
B-40.14	Process NPA					x		
B-40.15	Provide a retirement congratulatory letter and additional information to each retiree regarding OPM; provide TSP withdrawal information					x		
B-40.16	Complete individual retirement record and forward to OPM NLT 30 days after separation						DFAS	