U.S. Office of Personnel Management
Fall Festival of Training 2012
Pittsburgh, PA

WORKSHOP DESCRIPTIONS

Retirement Operations Center Experience

[Tuesday, November 27, 2012, Cost $345]
[Wednesday, November 28, 2012, Cost $345]
[Thursday, November 29, 2012, Cost $345]

This “workshop” will offer a unique experience at the Retirement Operations Center (ROC) in Boyers, PA. Not just a tour of the facility, but the chance to follow the flow of retirement applications and forms through their processing at the ROC.

The morning activities will consist of an orientation and a tour of the ROC with stops at the various processing areas to explain what we do as you follow the workloads through the facility. The afternoon will be breakout sessions on various work processes performed at the ROC, such as death in service, deceased annuitant, and deposit/redeposit.

This workshop is intended for human resource professionals who work with benefits programs. Transportation from the Sheraton Station Square and lunch at the ROC are included. Participants in this workshop must bring a government ID and a second photo ID. Closed-toe shoes are required at the ROC. Extensive walking is involved.

Tuesday, November 27, 2012

Retirement Readiness *Realities*: It's More Than Your Paycheck!

[Tuesday, November 27, 2012, Cost $345]

Based on feedback - and lessons learned - from federal retirees, this is a highly interactive workshop in which you will share ideas and learn how to assist employees to prepare for retirement in 3 main areas including networking, health and well-being, and wealth. You will utilize tools for self-assessment, prepare an "Individual Retirement Plan", discuss issues and challenges including transition (new identity, changing roles and expectations), financial preparedness, health and elder care issues, relocation considerations, preparation for reemployment or self-employment, networking opportunities, activities to stay engaged.

Your employee may be *eligible* to retire…but is he *ready* to retire? The "self-assessment" portion of the class will prepare you, the HR representative, to help the employee seriously think about retirement. We'll discuss questions such as: What do you do (or will you do) to challenge yourself...To what extent are you building new friendships or associations outside of work... To what extent do you add meaning to your life exploring new interests?

Disability Application Processing NEW

[Tuesday, November 27, 2012, Cost $345]

This all-day workshop provides you with the basic information you need to effectively understand the complexities of disability retirement. This workshop will help you better understand the necessity to ensure that a complete package is sent to OPM. During this workshop you will learn:

- The criteria for a disability entitlement
- The procedures for submitting and processing disability retirements
- The roles of OPM, the Agency and the Employee
- Due Process in disability
- What the employee should know about being on the disability rolls
- How benefits under OWCP impact disability retirement
- How benefits for a disability retirement under CSRS, CSRS Offset, and FERS are computed

This workshop is for human resource professionals who need to know the basics for processing and working with employees for disability retirement. The workshop will consist of lecture, sample exercises, and interactive discussion of sample situations.

Retire in Good Health – Medicare and FEHB

[Tuesday, November 27, 2012, Cost $345]

This workshop is a unique opportunity to learn about Medicare and how it works with the Federal Employees Health Benefits (FEHB) Program. The goal of this workshop is to educate professionals, like you, about the aspects of the Medicare and FEHB programs that affect Federal employees and retirees —to help them make informed health care decisions. Our seminar will be divided in six separate learning sessions:

1. Understanding Medicare—All about Medicare, coverage and options
2. Detailed information about Medicare Part B, eligibility and enrollment.
3. Medicare Assignment and coordination of benefits between Medicare and FEHB.
4. What to consider when making the decision to enroll in Medicare when you have FEHB
5. Interactive exercises to review lessons learned
6. Interactive games to test your knowledge and opportunity to ask questions

Tools for take-away: Publications, fact sheets, and a hard copy of the PowerPoint module to use as a reference and to educate others. This workshop is for agency benefit officers/HR personnel who work with employees 65 and above and who receive questions from retirees. Attendees should have a basic understanding of the FEHB program.

Benefits for Those Called to Active Duty

[Tuesday, November 27, 2012, Cost: $345]

Do you have employees who have been called into active duty military service? Do you have questions about the benefits when an employee is absent or separated to perform active military duty? Are you confused about or worried you are not complying with the Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA)? If you want to learn about how to manage retirement and insurance for employees called to active military duty, then this class is for you. The goal of this 1-day workshop is to equip human resources personnel with the critical information they need to properly administer the benefits for employees on active duty military.

During this workshop we will present:

- Overview of military definitions and the basics of military deposits
- Discussion of USERRA
- Overview of benefits when paid leave is used during military absence
- Benefits while absent, including FEHB, FEGLI, TSP, FSA etc.
- Benefits after absence, CSRS, FERS, FEHB, FEGLI, TSP, etc.
- Exercises

This workshop is for human resource professionals who already have basic knowledge of retirement and insurance benefits.

Social Security Basics

[Tuesday, November 27, 2012 **(½ day, 8:30 – 11:45am)** Cost $245]

New to your agency?? Need a little help getting a handle on Social Security benefits?? If so, this **half-day** workshop will be perfect for you! We will cover basic eligibility requirements for Retirement, Disability and Survivor benefits...plus how CSRS, FERS and CSRS Offset can potentially affect monthly payments. We will also be checking out the Social Security web site to see what's available specifically to help you assist your employees.

CSRS and FERS Overview

[Tuesday, November 27, 2012 **(½ day, 8:30 – 11:45am)** Cost $245]

Do you know the differences between the FERS and CSRS retirement systems? Do your employees? In this **half-day** workshop we will do a side by side comparison of both retirement systems, discussing everything from eligibility requirements, survivor benefits, treatment of deposits and redeposits, contributions, and numerous other topics as well as how you should communicate these topics to your employees. We will include some new changes in retirement rules, to include an overview of: Phased retirement, Revised Annuity Employee (RAE), and final rules on electing an insurable interest survivor annuity. You will receive a copy of the PowerPoint presentation which you can use to educate your own employees as part of your financial education strategy.

This workshop is for Human Resource (HR) Specialists who are new to the benefits area and need an overview of the retirement systems.

Flexible Spending Account (FSAFEDS) / Long Term Care Insurance (FLTCIP)---A Pathway to Wealthy (& Healthy) Feds

[Tuesday, November 27, 2012 **(½ day, 8:30 – 11:45am)** Cost, $245]

This **half-day** workshop covers two of the least understood and under-utilized benefits programs for Federal employees: the Federal Flexible Spending Account Program (FSAFEDS) and the Federal Long Term Care Insurance Program (FLTCIP).

Why are your employees leaving money on the table every year? The simple answer is that most of them do not realize the benefits of flexible spending accounts and are unaware of FSAFEDS. Join us to de-bunk the myths and unravel the mysteries surrounding flexible spending accounts. You and your employees don't need to be a Certified Public Accountant or a financial planner to understand FSAFEDS. This workshop addresses everything you need to know to help your employees understand the benefits, eligibility requirements, rules and regulations, barriers to participation, account details, eligible expenses, and the reimbursement process.

Did you know members of the Federal family can apply for FLTCIP coverage at any time with full underwriting? (New and newly eligible employees and their spouses have 60 days to apply with abbreviated underwriting.) Because premiums are based on age, there's no better time to learn more. We’ll show how EASY it is to design a plan, and how affordable plan options can be! We’ll review all the tools and educational resources available for Benefits Officers/trainers, to help your employees make an informed decision.

The objective of this workshop is to give you background knowledge so you can help employees understand program details and direct them to the right resources for their enrollment questions. This workshop will be presented by experts from SHPS which administers FSAFEDS and Long Term Care Partners, LLC which administers the FLTCIP. Content will be presented in a variety of styles (including Q & A, handouts review) but mainly lecture format.

This workshop is recommended for new HR professionals and those who are looking to provide more comprehensive education on these valuable recruitment and retention benefits.

Court Order Benefits NEW

[Tuesday, November 27, 2012 **(½ day, 12:45 – 4:00pm)** Cost: $245]

OPM administers Court Order Benefits for former spouses, legally separated spouses and children. Court Order Benefits affect CSRS, FERS, refunds of retirement contributions and survivor benefits. Court Order Benefits can also affect FEHB, FEGLI, FEDVIP & FLTCIP. These and many other topics are discussed in this ½ day workshop. This workshop is for human resource professionals who need to know the basics for processing and working with employees who have Court Ordered Benefits.

Special Retirement Provisions for Senior Officials

[Tuesday, November 27, 2012 **(½ day, 12:45 – 4:00pm)** Cost: $245]

This **half-day** class will focus on the special retirement provisions for Senior Officials. This class explains the special retirement provisions that apply to a limited group of senior officials who hold certain senior positions, or who previously held such a position, that became subject to mandatory Social Security (OASDI) coverage on January 1, 1984. The special retirement rules covered in this class are only those rules that apply to the following senior officials:

- Individuals in the Executive Schedule positions listed in 5 U.S.C. 5312 through 5317
- Noncareer appointees of the Senior Executive Service
- Personal staff of the President and Vice President
- Members of Congress; and
- Certain Federal judges

As you know, this is an election year and many Senior Officials will be leaving and others will be arriving. This class can prepare you for dealing with these unique individuals.

Prerequisites for this class include understanding coverage rules for regular employees as well as Reemployed Annuitant provisions for regular employees. If you do not meet the prerequisites for this class you should not register for it.

Phased Retirement (Repeated) NEW

[Tuesday, November 27, 2012 **(½ day, 12:45 – 4:00pm)** Cost: $245]

The President signed Public Law 112-141, the "Moving Ahead for Progress in the 21st Century Act," or "MAP-21," on July 6, 2012. Section 100115 creates Phased Retirement. During Phased Retirement an employees can receive half their annuity and work half-time and receive half their pay. Survivor and insurance benefits will continue as though they were full-time employees.

This **half-day** workshop will provide basic information on the new Phased Retirement option. Topics covered will include how and when your employees could potentially use this new retirement option. We'll discuss comparisons of Phased Retirement vs. full retirement vs. working as a reemployed annuitant. The workshop will also cover the current implementation process for Phased Retirement.

This class is only for experienced HR professionals. You must have at least 5 years of extensive experience in retirement in order to fully benefit from taking this course.

Wednesday, November 28, 2012

Long Term Leave and Leave Abuse

[Wednesday, November 28, 2012, Cost $345]

Do you have employees with circumstances requiring extensive use of leave, but are not sure what programs are available and how they interact? Do you have employees who may be leave abusers but are unsure how to address this situation? Ultimately, it is the responsibility of each agency to balance support for employees' needs or desires for leave with the need to ensure that employees' work requirements are fulfilled and agency operations are conducted efficiently and effectively. In most cases, agencies can achieve this balance without difficulty, but sometimes agencies' needs and employees' requests conflict. Employees may mask leave abuse under the guise of leave entitlements. Or they may have legitimate chronic or ongoing health conditions that prevent reliable attendance and performance of their duties. What are the appropriate responses to situations where agencies' and employees' needs are in conflict? In this workshop, we will examine these topics from a leave policy as well as an employee relations policy perspective.

Topics covered will include—

- leave programs that can be used for chronic or long-term conditions, i.e., sick leave, advanced leave, the Family and Medical Leave Act (FMLA) leave, and leave sharing programs;
- when leave must be approved, and when it can be denied;
- the interrelationship of leave programs;
- medical certification requirements (including recertifications and questionable medical certification for FMLA);
- reasonable accommodation;
- leave restriction; and
- using disciplinary and other HR tools regarding AWOL, inability to keep a regular work schedule, and medical inability to fulfill the requirements of the position.

Attendees will discuss case scenarios and participate in class exercises. This course is recommended to those who have previously taken the Introduction to and Overview of Federal Leave Systems workshop, or work extensively with leave programs. This is NOT a beginner course.

FEHB for Experienced HR Professionals

[Wednesday, November 28, 2012, [Cost $345]

Are you an experienced HR professional, but need some help with uncommon FEHB scenarios? Come spend a day with experienced staff from OPM's Federal Employee Insurance Operations (FEIO) and examine advanced FEHB issues. We've designed an interactive, hands-on day combining problem solving and group exercises involving real life situations. After completing this workshop, you will be an expert on these subjects and more:

- Enrollment
- FEHB premiums
- Open Season
- Eligible family members
- Nonpay or insufficient pay status
- Continuing FEHB coverage into retirement.

We'll even discuss and help you resolve questions you bring to the workshop.

This course is designed for individuals who know the basics of the FEHB Program (at least one year of FEHB experience) and want to learn about more complex subjects. This is **NOT** a course for individuals new to the FEHB Program or anyone who has worked with FEHB for less than one year.

Interrelationship of Government Pensions & Social Security

[Wednesday, November 28, 2012, Cost $345]

Have employees complained to you about not understanding reductions in their Social Security benefits? Do you know how to answer questions about an employee's Social Security Statement? If you would like to know how to answer these questions and to learn more about the interrelationship between Social Security and Government Pensions this is the class for you. The goal of this 1-day workshop is to provide human resource personnel information to understand the interrelationship between the Civil Service Retirement System (CSRS), the Federal Employees Retirement System (FERS) and Social Security benefits. This workshop is presented by experts from the Office of Personnel Management and the Social Security Administration.

During this workshop you will learn:

- How Social Security benefits are calculated
- The reductions to these benefits from the Government Pension Offset and the Windfall Elimination Provision
- How to adjust the projected Social Security benefit for the Windfall Elimination Provision
- The impact caused by the interrelationship of the benefits for individuals under each retirement system on disability retirement, pre-and post-56 military credit, military retirement pay, and survivor benefits
- How to counsel employees on the use of the Social Security Statement
- Information on the FERS annuity supplement

This workshop is for human resource professionals who already have basic understanding of both retirement systems (CSRS and FERS). No knowledge of the Social Security program is required.

FEGLI Basics

[Wednesday, November 28, 2012, Cost $345]

Do you need to learn the basics about the Federal Employees' Group Life Insurance (FEGLI) Program? Perhaps you want to understand how the proposed regulations will work? Or maybe you just need a refresher course? Then come spend a day with OPM's knowledgeable and experienced FEGLI insurance analysts. This interactive class is presented in a lecture/slide format, with time set aside for challenging exercises and Q & As to coverage questions you have. During the day, you'll learn about:

- A brief history of the Program
- The roles of OPM, MetLife, and agencies
- Types of insurance
- Eligibility information and election opportunities
- The purposes and uses of various FEGLI forms
- What to do when an employee dies, retires, goes into nonpay status, or leaves the Federal government
- Answers to beneficiary and claim issues (who gets the money?)
- Effect of proposed regulations
- Where to get answers to your questions

This class is designed for HR employees with little or no prior working knowledge or experience with the FEGLI Program, or for employees who have been away from FEGLI for a while and could use a refresher on the basics of the Program. You'll definitely benefit from this course, and enhance your knowledge of the FEGLI Program!

Reemployment of Annuitants

[Wednesday, November 28, 2012, Cost $345]

The words "reemployed annuitant" can strike fear into even the most knowledgeable benefits counselor. While questions relating to reemployed annuitants are many, answers are sometimes hard to come by. In this workshop, you will find many answers. By the end of this workshop, you will be able to:

- Identify when annuities terminate and when annuities continue when a CSRS or FERS annuitant return to work for the government.
- Explain how a reemployed annuitant's salary is offset by the amount of the annuity.
- Identify what retirement coverage is appropriate when an annuitant is reemployed.
- Describe what happens to an annuitant's Federal health and life insurance coverage upon reemployment with the Federal government.
- Identify what benefits are available to a reemployed annuitant when the reemployment ends.
- Explain how supplemental and redetermined annuities are computed.
- Explain what happens to an annuitant's Federal health and life insurance coverage when reemployment ends.

It is strongly recommended that you review the information in Chapter 100 of *the CSRS and FERS Handbook for Personnel and Payroll Offices* before attending this workshop.

This workshop is for human resource professionals who are responsible for counseling reemployed annuitants.

TSP Investments, Loans, & Withdrawals

[Wednesday, November 28, 2012, Cost $345]

This all day workshop will discuss the major features of the Thrift Savings Plan (TSP) available to plan participants and offers human resource professionals an opportunity to understand the options TSP provides to its participants. Topics will include:

- The TSP Investment Funds
  - The G, F, C, S and I Funds
  - The purpose of the Lifecycle Funds
- A review of TSP court order process
- The TSP loan program
- TSP withdrawal options

This workshop is being presented by an expert from the Federal Retirement Thrift Investment Board. The workshop is designed for human resource professionals with a good working knowledge of the TSP. It is highly recommended that participants have attended the Thrift Investment Board's "Overview" of the TSP" prior to this session.

Thursday, November 29, 2012

ABC’s of Insurance

[Thursday, November 29, 2012, Cost $345]

FEDVIP, FEGLI, FEHB, FSAFEDS, FLTCIP, BENEFEDS, QLE, HDHP, HRA, HSA, HMO, PPO, TCC … It’s a benefit alphabet soup out there. Come spend a day with experienced staff from OPM’s Federal Employee Insurance Operations (FEIO) and learn the basics of the health insurance, life insurance, and dental/vision insurance programs. This course will also touch on the Federal Flexible Spending Account Program and the Federal Long Term Care Insurance Program.

We’ve designed an interactive day combining classroom discussion and exercises. After completing this workshop you will not only know what all those letters mean, you’ll know the answers to these questions as well.

- What do they have in common and how do they differ?
- What are the eligibility requirements to enroll?
- When (and how) can employees enroll and when can they make changes in their enrollment?
- Who is an eligible family member?
- What happens when an employee leaves Federal service or retires?
- Where should employees go for more information about the programs or help with any problems with their claims and/or enrollment?
- How do the Programs coordinate benefits?

Most importantly, you will find out where YOU should go to for help on behalf of your employees with concerns about the health (FEHB), life (FEGLI), dental and vision (FEDVIP), long term care (FLTCIP), and flexible spending account (FSAFEDS) insurance programs.

This course is designed for individuals **new** to benefits (less than one year of experience) who want a basic understanding of the Programs. This is **NOT** a course for experienced professionals or anyone who has worked with these programs for a year or more.

Retirement Application Processing

[Thursday, November 29, 2012, Cost $345]

This workshop will help you better understand the necessity to ensure that a complete package is sent to OPM. In addition you will learn:

- The case flow from the point the employee meets with the human resource professionals through its completion at OPM
- The responsibilities of the employee, personnel office, payroll office and OPM
- What information is critical in order to authorize interim payments
- Impact of errors in the retirement package

This workshop is designed for **new human resources professionals** (with up to 5 years HR experience) involved in the retirement application process. This workshop will be presented in both lecture style and attendee participation.

OWCP

[Thursday, November 29, 2012, Cost $345]

This workshop will provide an overview of benefits available under the Federal Employees' Compensation Act (FECA), as well as an explanation of the roles and responsibilities of the employing agency and Division of Federal Employees' Compensation (DFEC) with respect to claims filed under the FECA.

Topics to be covered include: different types of claims which may be filed under the FECA; requirements of entitlement; continuation of pay (COP); wage loss compensation; schedule awards; medical benefits; case management and returning injured employees to work; available resources and references; medical authorization and bill payment procedures.

This workshop is being presented by an expert from the DFEC, Department of Labor. This workshop is intended for human resource professionals who work with Office of Workers Compensation Program (OWCP) claims and counsel employees injured on the job.

Military & Civilian Deposits under CSRS & FERS

[Thursday, November 29, 2012, Cost $345]

Do you know what happens to an application to make military or civilian deposit once it leaves your agency? Can you explain how deposits and redeposit are computed? This 1-day workshop will focus on processing applications for civilian and military deposits and redeposits.

Participants will learn:

- Rules for crediting nondeduction and refunded service
- Rules for crediting Post-56 Military service
- The effect of making or not making deposits or redeposit for civilian and Post-56 Military service
- Computing the amounts of deposits and redeposit for civilian and military service
- The roles and responsibilities of the employee, agency and OPM

In addition to the topics listed above, we will discuss service credit and deposit computation issues for employees with concurrent military and Federal/DOD civilian service under the Uniformed Services Employment and Reemployment Rights Act of 1994 (USERRA).

Participants should be human resource professionals who already have a basic level of knowledge of retirement issues. The class will be presented in a variety of styles, but mainly in lecture format.

Understanding Roth TSP Contributions

[Thursday, November 29, 2012 **(½ day, 8:30 – 11:45am)** Cost $245]

The information in this **half-day** presentation is intended to help human resources professionals to answer basic employee questions about the mechanics of Roth Thrift Savings Plan (TSP). A representative of the Federal Retirement Thrift Investment Board will explain how Roth contribution elections are made, how Roth balances will be treated within the account, and what conditions must be satisfied in order to enjoy tax-free treatment of withdrawals. The program will also highlight some of the major differences between Roth TSP, traditional tax-deferred TSP, and Roth IRAs.

This course is for HR professionals who are already familiar with the basics of the TSP.

NAREA

[Thursday, November 29, 2012 **(½ day, 8:30 – 11:45am)** Cost $245]

Non-foreign Area Retirement Equity Assurance (NAREA)- This **half-day** workshop is a review of general guidance concerning the Non-foreign Area Retirement Equity Assurance (NAREA) provision of the National Defense Authorization Act for Fiscal Year 2010, Public Law 111-84, signed on October 28, 2009.

This workshop is intended for HR professionals with some knowledge of the Federal retirement programs. This workshop will be presented in a variety of styles, but mainly in lecture format.

Crediting Service Performed Under Another Retirement System for Federal Employees

[Thursday, November 29, 2012 **(½ day, 12:45 – 4:00pm)** Cost $245]

This **half-day** workshop is for human resource specialists who deal with employees who have performed service or are retired under other retirement systems for Federal employees, such as the Foreign Service Retirement and Disability System, Foreign Service Pension System and the Tennessee Valley Authority Retirement System, among others. Specifically, this workshop is for specialists who make retirement coverage determinations, determine retirement eligibility, perform retirement counseling and/or prepare retirement estimates for employees who performed service or are retired under other retirement systems for Federal employees. In this workshop you will learn**:**

- How service performed under other Federal retirement systems is credited toward CSRS and FERS retirement;

- How to make retirement coverage determinations for Federal employment that follows service performed under another Federal retirement system;
- The differing provisions of other retirement systems and what affect those provisions have when crediting service for purposes of retirement coverage determinations and for title to and computation of retirement benefits under CSRS and FERS; and,
- When funds can be transferred between systems and when deposit or redeposit payments are required.

This workshop is for experienced Human Resource Specialists who work in Staffing and/or Benefits.

Phased Retirement (Repeated) NEW

[Thursday, November 29, 2012 **(½ day, 12:45 – 4:00pm)** Cost: $245]

The President signed Public Law 112-141, the "Moving Ahead for Progress in the 21st Century Act," or "MAP-21," on July 6, 2012. Section 100115 creates Phased Retirement. During Phased Retirement an employees can receive half their annuity and work half-time and receive half their pay. Survivor and insurance benefits will continue as though they were full-time employees.

This **half-day** workshop will provide basic information on the new Phased Retirement option. Topics covered will include how and when your employees could potentially use this new retirement option. We'll discuss comparisons of Phased Retirement vs. full retirement vs. working as a reemployed annuitant. The workshop will also cover the current implementation process for Phased Retirement.

This class is only for experienced HR professionals. You must have at least 5 years of extensive experience in retirement in order to fully benefit from taking this course.