

BENEFITS
BASELINE VIEW

General comment on all ABC-C processes
CPC personnel provide counseling to employees on
services provided by ABC-C and assistance in completing
these.

A	B	C	D	E	F	G	H	I	J	K	L	
NEW #	Old Task #			M	M	SHAD	P	PAB	RESO	DF	ENT	CURR PROPO
				G	P	OW	O	A-C	URCE	A	TASK	SED
				R	L	EMPL	C	C	MGT	S	LIST	COMMENT

BENEFITS AND ENTITLEMENTS

FEHB - Process

Coordinate General FEHB Actions

Issue periodic reminders, information/changes in region

7

1 1 regarding FEHB or Temporary Continuation of Coverage

X

2 2 issue activity-unique reminders, information/changes

X

CHECK THIS PROCESS - NOW AUTOMATED

3 3 Submits SF 2809
enrol/change enrollment, signs form, attaches

X

statement for children over 21, 3-day requirement met,

X

4 4 proof of qualifying event (certificate), etc.

X

reconsideration rights to Field Advisory Service if the

X

employee is ineligible for FEHB enrollment or change to

X

5 5 enrollment

X

Determine whether reasons for late elections were due

X

6 6 to "causes beyond employee's control"

X

Prepare and attach a memorandum indicating reasons

X

7 7 for accepting late elections

X

Annotate the SF 2809 with the determination that this is

X

8 8 a valid late election or belated open season election

X

Determine and verifies the proper effective date on the

X

9 9 SF 2809

FEHB relationship to once
cases and
benefits

BENEFITS
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		E	C C	CURR PROPO
NEW	Old	M M	SHAD P P AB RESO DF	ENT SED
TASK	Task	G P OW	O A C- URCE A	TASK TASK
#		R L	EMPL C C C MGT S	LIST LIST COMMENT
	Certify eligibility by signing the SF 2809 as the "authorized agency official"		X	
10	Disseminates SF 2809 to reach DFA/S by end of pay period		X	
11	File the certified Part 1 of the SF 2809 to the organizational activity		X	
12	Send Part 5 of the SF 2809 to the organizational activity	X		
13	Receive and give employee copy to employee	X		
14	Coordinate FEHB Open Season (Future Employee Express)			
15	Notify employees of the event	X X		
16	Schedule and arrange for health fairs	X		
17	Make election forms available to employees	X		
18	Obtain, complete, and submit election form	X		
19	Receive, date stamp, verify, determine effective date, certify and disseminate			Should be automated

BENEFITS
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NEW TASK #	OLD TASK #	Coordinate Acquisition of FEHB Supplies									
		E M R	C M L	C SHAD P EMPL	C PAB O C C	C RESO O AC- C	C DF URCE A	C ENT MGT	C TASK LIST	C SED A LIST	C PROPO COMMENT
20	20	Maintain a supply of current FEHB forms									AUTOMATED NOW
		Coordinate FEHB Temporary Continuation (TCC) and Spouse Equity Act					X				
21	21	Notify personnel of intent to separate or of eligible children/former spouses				X	X	X			X X
22	22	Notify children of rights to TCC 14 days from notice send TCC enrollment to retirement system if employee is receiving an annuity or the divorce was after 23 retirement)				X					
23						X					
24	24	Verify eligibility and requests additional documents if necessary.				X					
25	25	Verifies that an employee's separation was not due to gross misconduct				X					
26	26	Return employee copy to enrollee, files OPF copy and sends remainder of packet to NFC for processing				X					
27	27	Send SF 2809 to carrier, establishes master file				X					
28	28	Change enrollment or requests termination of enrollment	X								
29	29	Receive and process TCC changes				X					
30	30	Monitor and terminate TCC enrollment				X	X				

IDEF REVISED

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NEW TASK #	Old Task	E	C C	CURR PROPO
		M M SHAD P PAB	RESO DF ENT	SED
		G P OW O AC-	URCE A	TASK
		R L EMPL C C C	MGT S LIST	LIST COMMENT

FEHB - Advise/Assist

Coordinate General FEHB Actions

31. 31 Answer routine questions from employees

X

- Provide verification of employee's FEHB coverage to

X

- 32 customers.

Obtain assistance/guidance from Field Advisory

X

- Services for general questions or from SAMR-CPP-SM

X

Dual mission with no capabilities

- 33 for Army Unique issues

X X

- 34 Coordinates actions with payroll (DFAS), CPOC, ABC-C,

X X

Both employee and ABC-C rely on CPOC to relay and obtain information

- 34 health carriers, etc. to resolve problems

X X

- 35 Assist employees with health carrier issues, i.e., carrier

X X

- 35 canceling coverage for no apparent reason

X X

Both employee and ABC-C rely on CPOC to relay and obtain information

- 36 Assist employees with making health benefit changes

X X

- 36 using automated systems.

X X

- 37 Notify employee in writing when health carrier drops out

X X

- 37 of the FEHB program.

X X

Coordinate FEHB Temporary Continuation and Spouse

Equity Act

- Counsel eligible individuals about eligibility/open seasons/conversions and that effective date is

X

- 38 retroactive

BENEFITS AND ENTITLEMENTS (CONTINUED)

**BENEFITS
BASELINE VIEW**

NEW TASK #	Old Task	E	C	C	CURR	PROPO				
		M	M	SHAD	P	PAB	RESO	DF	ENT	SED
TSP - Process										
Provide General TSP Support										
39	39	Issue periodic reminders and changes, and information pertaining to open season		X	X					
40	40	Conduct periodic audits to detect potentially erroneous TSP coverage		X	X					
41	41	Initiate actions to correct agency errors		X					CPAC Old with employee identification errors	
42	42	Notify employees in writing of discovered TSP errors (i.e., e-mail, notes, faxes, letters, etc.)		X	X					
43	43	Refers questionable cases to the Thrift Investment Board		X					CPAC Advertise Open enrollment periods	
44	44	Attends TSP training from Thrift Investment Board		X					CPAC Advertise Open enrollment periods	
Coordinate TSP enrollment										
45	45	Provides employee with Form TSP-1, Election Form, and TSP-3, Designation of Beneficiary		X					AUTOMATED	
46	46	Completes and returns forms		X						

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NEW TASK #	Old Task #	CURR PROPO																																							
		E	C	C	M	M	S	H	A	R	E	F	D	P	B	R	E	S	E	O	A	C	U	R	C	T	A	T	S	L	I	L	LIST	COMMENT							
47	47	Determines eligibility to participate in TSP, TSP SCD, effective date of election															X	X																							
48	48	Files original on right side of OPF, forwards copy to payroll and furnishes employee with copy															X	X																							
49	49	Submits data to National Finance Center																																							
50	50	Requests information	X																																						
51	51	Provides employee with Form TSP-20, TSP Loan Application, and TSPBK4, Loan Application Booklet																																							
52	52	Processes the application																																							
53	53	Coordinate TSP Death Cases																																							
54	54	Submits notification of death	X																																						
55	55	Sends survivors TSP-17, Application for Account Balance of Deceased Participant		X																																					
55	55	Furnishes death certificate and appropriate form	X																																						

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#	NEW TASK	Old Task	E M G R	C M P L	C HAD OW EMPL	C P O C	C PAB AC- C	C RESO URCE MGT	C DF A S	C ENT TASK LIST	C CURR SED TASK LIST	PROPO COMMENT
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Coordinate TSP Open Season (Future Employees Express)

- | | | | AUTOMATED |
|----|--|---|--|
| 67 | 57 Accepts, and date stamps open season changes | X | |
| 68 | 58 Processes and disseminates copies | X | SYSTEM |
| | Coordinate TSP - Separations/Retirements | | |
| 59 | Determines eligibility for an immediate or deferred annuity | X | |
| 60 | 60 Sends employee a TSP withdrawal packet | X | |
| | Verifies that employee is eligible to select withdrawal method selected | X | |
| 61 | 61 method selected | X | |
| | AUTOMATED TSP WEBSITE | | |
| 62 | 62 Gives necessary form to employee | X | |
| 63 | 63 Coordinate with payroll, when necessary | X | |
| | Sends the employee a TSP withdrawal packet with the NPA if employee separates without counseling | X | Who is supposed to do retirement counseling? |
| 64 | 64 NPA if employee separates without counseling | X | |

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#	NEW TASK	Old Task	C C		CURR	PROPO			
			E M G R	M M P L	P P OW EMPL	A B RESO CCC	D F ENT A TASK	SED URCE MGT	COMMENT
									X

Maintain TSP Supplies

NO LONGER NEEDED

- 65 65 Maintain a supply of TSP forms

BENEFITS AND ENTITLEMENTS (CONTINUED)

TSP - Advise/Assist

Coordinate TSP Enrollment

X

X

- 66 66 Provides counseling

Coordinate TSP Loans

X

- 67 67 Assists employee, where necessary

CPAC responsibility: Counsel employee family members in process to contact / work with TSP

Coordinate TSP Death Cases

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NEW TASK #	Old Task #	E	C C	CURR PROPO	
		M M	SHAD P P	AB RESO DF	ENT SED
G P	OW O A C-	URCE A	TASK	TASK	COMMENT
R L	EMPL C CCC	MGT S	LIST	LIST	
68	68 Provides counseling on how balance will be paid			X	
69	Coordinate TSP Open Season (Future Employee Express)				<i>Priority of Open Seasons - CPOC Training on use of System - Access</i>
70	Answers employees questions regarding open season			X	
70	Assist employee with making election using automated systems			X	
71	Coordinate TSP - Separations/Retirements				
71	Counsels employee on withdrawal options, if eligible		X		
72	Coordinate General TSP Actions				
72	Coordinates answers with payroll (DFAS), CPOC, and ABC-C to resolve problems		X		
BENEFITS AND ENTITLEMENTS (CONTINUED)					

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NEW TASK #	Old Task #	E	C C	CURR	PROPO
		M M	SHAD P PAB	RESO DF ENT	SED
		G P	OW O A C-	SOURCE A	TASK
		R L	EMPL C C	MGT S	LIST LIST
					COMMENT

FEGLI - Process

Coordinate General FEGLI Actions

Issue periodic changes, information, and reminders

X X

Employee Identified errors - cprc

73 Issue periodic changes, information, and reminders

73 pertaining to FEGLI

X

74 Conduct periodic audits to detect potentially erroneous FEGLI coverage

X

75 Initiate actions to correct agency errors

X

76 Notify employees in writing of discovered FEGLI errors (i.e. e-mail, notes, faxes, letters, etc.)

X

77 77 Completes SF 2821 promptly following termination

X

78 Sends original and duplicate of the SF 2821 to employee or assignee along with a complete SF2819

X

79 Accepts, verifies and date stamps Designation of Beneficiary forms, SF 2823

X

80 Returns designations from retirees/separated employees and informs them to submit designations directly to OPM

X

81 If insurance assigned, accept assignees Designation of Beneficiary form.

X

82 Refer questionable designations to OFEGLI

X

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		E M G R	C M P L	C SHAD OW C CCC	C P A C MGT	CURR RESO DF URCE A	PROPO ENT TASK LIST	COMMENT
NEW #	Old Task #							
94	94 Certifies eligibility by signing SF 2817					X		
95	95 Verifies effective date on SF 2817						X	
96	Produces and disseminates NPA reflecting actual insurance elections/cancellations					X X		
97	97 Sends SF 2817 and NPA to DFAS					X X		
98	Files the certified part 1 of the SF 2817 on right side of OPF					X		
99	Sends employee copy of the SF 2817 to the organizational activity					X		
100	Mails/faxes questionable cases to SAMR-CPP-SM for assistance					X		
101	Assist employee with making election or change using automated systems.					X		
102	102 Notifies employee of event					X X		
103	103 Make election forms available			AUTOMATED				process should be automated eliminating CDC in judgement to date of on-line NPA issues NPA back through system to
104	Receives, stamps, verifies, certifies, issues NPA and submits to DFAS					X X		CPAC

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#	Old Task	New Task	E	C	C	CURR PROPO				
			M	M	SHAD	P	P	ABRESO	DF	ENT
G	P	OW	O	O	A-C-	URCE	A	TASK	TASK	
R	L	EMPL	C	C	MGT	S	LIST	LIST	COMMENT	

Coordinate FEGLI - Leave Without Pay

105	105	Monitor and terminate after 12 months									X
106	106	Complete notice of conversion privilege (SF 2819) and agency certification of insurance status (SF2821) and mail									X
107	107	Coordinate FEGLI - Death Cases Send FE-6 to each assignee and to beneficiary if assignee has designated a beneficiary at last known address									
108	108	If notified by supervisor, notify management and request RPA			X						
109	109	Complete and submit SF 2821 to DFAS within 24 hours from notice		X							
110	110	When SF 2821 returned send copy to OFEGLI immediately		X							
111	111	File original SF 2821 in temporary file until claim for death benefits is received			X						
112	112	Verifies accuracy and completeness of forms				X					

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	E	C	C	CURR	PROPO		
NEW	M	M	SHAD	P PAB	RESO DF ENT	SED	
TASK	G	P	OW	O A C-	URCE A	TASK	
#	R	L	EMPL	CCC	WMTG	S LIST	LIST COMMENT

BENEFITS AND ENTITLEMENTS (CONTINUED)

Question or Summary benefit election
and Korean spouse knowledge

	Coordinate FEGLI - Separations/Retirements					
	Give necessary form(s) to employee. SF 2818 - Continuation of Life Insurance, SF 2819 - Notice of Conversion					
113	113 Conversion					
114	Employee's Retired Status, SF 2821 Agency Certification Privilege, SF 2820 - Certification of Insured					
115	114 of Insurance and coordinate with payroll, when necessary OPM 1482 Agency Certification of Status of Reemployed					
116	115 Annuitants and RI 76-10					
117	Include remark code B69 on separation NPA to annotate 116 FEGLI assignment					
118	117 Completes SF 2821 (Certificate of Life Insurance) Provides SF 2821 to OPM if employee is ineligible or elects to discontinue insurance					
119	118 If eligible, attach SF 2821/beneficiary forms and/or assignments to application and gives employee part 2 assignments to application and gives employee part 2 along with a completed SF 2819					
120	120 Attaches original SF 2817 to application If effective date of change falls after retirement, attaches 121 the original and part 2 of SF 2817 to the SF 2821					
122	122 Files part 3 of SF 2821 in the OPF					
	NO LONGER NEEDED					

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NEW TASK #	Old Task	CURR PROPO										COMMENT
		E	C	C	M	M	SHAD	P	P AB	RESO	DF	ENT
G	P	OW	O	A	URCE	A	TASK	TASK	R	L	EMPL	MGT
R	L	EMPL	C	C	S	LIST	LIST					
<i>Coordinate FEGLI - OWCP</i>												
123	123 will not be reinstated for deferred annuity									X		
123	123 will be reinstated for postponed MRA + 10 and FEGLI											
124	124 optional insurance											
125	125 period which pay ceased											
126	Notifies OWCP on CA-7 of coverage, DOB and pay											
127	127 employee returned to duty											
128	128 SF 2819											
129	If employee elects to continue coverage, prepares an SF 2819 and sends to OPM with designations of beneficiary and assignments											
<i>Coordinate FEGLI - Reemployed Annuitant</i>												
130	Annotate the SF 2817 and designate forms with the words "re-employed annuitant" and the retirement claim number and send to OPM or file in OPF as appropriate											
131	Send copies of all SF 2817s filed during reemployment to retirement system											
131	131 to retirement system											

I don't understand relationship between FEGLI and OWCP - what would raise this question to clar situation

There needs to be a separate ADO process

Accidental
Dental
Disembodiment

Question here with employee or processor through OAC. Knowledge of states

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NEW TASK #	Old Task		E	C C	CURR	PROPO	COMMENT
			M M	SHAD P P AB RESO DF ENT SED	G P OW O AC-URCE A TASK	R L EMPL C CCC MGT S LIST LIST	
If claim for accidental death or dismemberment (ADD) is received, sends it to OFEGLI							
132						X	
132							Permitting within claimant. Advancing claim and rights do file end of Acc process.
Coordinate FEGLI Assignments							
133	133	Provide viatical settlement form with FEGLI			X		
134	134	File information disclosed to settlement form in OPF			X		
135	135	Provide notification to each assignee			X		
136	136	Provide copies of RI 76-21, RI 76-10 and blank SF 2823 to assignee			X		
137	137	Notifies employee of effective date of assignment			X		
138	138	Verifies employment has not elected a living benefit			X		
139	139	Obtains and files the current address of assignees			X		
Coordinate FEGLI - Living Benefits							
140	140	Upon receipt of FE-8a from OFEGLI, certify salary, coverage, etc.				X	

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#	NEW TASK	OLD TASK	E	C C	CURR	PROPO
			M M	SHAD P PAB	RESO DF	ENT SED
			G P OW	O A C-URCE	A TASK	TASK
			R L	EMPL C CC	MGT S	LIST LIST COMMENT

141 141 Fax FE-8a to DFAS and mail original to OFEGLI

X

Upon receipt of FE-8c from OFEGLI, prepare NPA with

X

142 appropriate remarks and forward to DFAS

X

File the FE-8c in OPF and forward to OPM with other documentation at the time employee retires

X

Maintain FEGLI Supplies

X

Firms should be automated and online

144 Maintain a supply of FEGLI forms

X

AUTOMATED

145 Maintain a Supply of Booklets, Pamphlets and Handbooks

X

AUTOMATED

X AUTOMATED

X AUTOMATED

BENEFITS AND ENTITLEMENTS (CONTINUED)

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NEW TASK #	Old Task	CURRENCE PROPOSAL									
		E M G R	C M P L	C SHAD OW EMPL	C P O C C	A URCE O A CCC	D F O S	E NT AC MGT	T ASK LIST	S ED COMMENT	
FEGLI - Advise/Assist											
Coordinate FEGLI New Enrollment											
146	146 Provide counseling						X				
147	147 Answers routine questions						X				
148	148 Counsels employees on effects						X				
Coordinate FEGLI - Leave Without Pay											
Coordinate FEGLI - Death Cases											
Provide counseling on how balance will be paid and assists in completing the FE-6 Claim for Death Benefits											
149	149 assists in completing the FE-6 Claim for Death Benefits						X				
FE-6DEP Statement of Claim-Option C, FE-7 Claim for Accidental Death Dismemberment submits it to OFEGLI											
150	150 Accidental Death Dismemberment submits it to OFEGLI						X				
Coordinate FEGLI - Separations/Retirements											