

New Employee Checklist

Personnel Action Form - *Review for accuracy*

SF-50

Box 30 - Retirement System
Box 31 - SCD (Service Computation Date for Leave)

Beneficiary Forms - *Complete and submit to HR function*

SF 1152

Beneficiary for Unpaid Compensation of Deceased Civilian Employee

SF 2823

FEGLI Beneficiary

SF 2808(CSRS) - SF3102 (FERS)

Beneficiary for employee retirement contributions if no survivor benefits are payable

TSP Enrollment – *Complete at agency on-line payroll portal*

TSP 1

Election Form

Elect contribution of 5% per pay period to receive the full government matching (4%)

TSP 1-C

Catch-Up Contribution Election Form

Elect additional contribution up to maximum IRS allowable amount; no agency matching for these contributions

TSP – 3

Beneficiary for TSP account (*complete and submit directly to TSP*)

TSP Account Management

TSP BK 30

A guide that provides information about the TSP and how to manage your account

Deposits and Redeposits for Civilian Service and Post 56 Military Service Deposits

Make and complete deposits within 2 years of hire date to avoid interest charges. Deposits for temporary Federal employment or military service will increase the amount of CSRS or FERS annuity.

Contact HR function for forms and information.

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continued

Federal and State Tax Withholding

Elect your tax withholdings for State and Federal Income Tax.
Discuss with your tax advisor to determine appropriate amount.

Federal Employees' Group Life Insurance

Eligible new employees are automatically enrolled in Basic coverage WITHOUT HEALTH CONSIDERATION, and within 60 days of appointment may elect additional optional insurance.

Compare the cost of FEGLI insurance to the cost of term life insurance from a private insurance company.

Individual Disability Income Insurance

If you incur a long term illness and exhaust your sick leave, you may be on leave without pay. Consider private disability insurance that would provide some financial assistance in such circumstances.

You must have 18 months of FERS service to be considered for a disability retirement (long term disability).

Federal Employees Health Benefit Program

Eligible employees may enroll within 60 days of appointment
Consider plans that provide a Health Savings Account (HSA).

Federal Employees Dental and Vision Insurance Program

Employees eligible for FEHB may enroll in dental and/or vision plans within 60 days of appointment.

**Health Care Flexibility Spending Accounts (HCFSAs) or
Dependent Care Flexible Spending Accounts (DCFSAs)**

**New and eligible employees may, within 60 days of
appointment but no later than October 1st:**

Enroll in HCFSAs account to use pre-taxed salary to pay
qualifying medical, dental and vision expenses, and/or

Enroll in DCFSAs account to use pre-taxed salary to pay
qualifying dependent care expenses.

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