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From: SECSTATE WASHDC
Action: ALL DIPLOMATIC AND CONSULAR POSTS COLLECTIVE *ROUTINE*
E.O.: 13526
TAGS: APER, AMGT
Subject: Ensuring the Accuracy of Your Personnel Data: Using the Checklist for Reviewing Electronic Official Personnel File (eOPF)

Key points:

- All Department of State (DoS) employees are responsible for ensuring their personnel information is accurate in their electronic Official Personal File (eOPF).
- The Office of Casualty Assistance (OCA) within the Bureau of Global Talent Management (GTM) developed a checklist to assist employees (Civil Service, Foreign Service, and working Eligible Family Members) in ensuring the accuracy of their personnel information and avoiding common mistakes.
- Errors can lead to serious consequences. Inaccuracies can render the beneficiary designation form invalid, delay payment to beneficiaries, result in payments to unintended recipients, etc.
- Failure to maintain updated designation of beneficiary forms may result in hundreds of thousands of dollars going to the wrong person.
- Use the checklist below to ensure your personnel information is accurate.

Summary:

Over 20 years of service to DOS employees and their families, GTM/OCA has encountered errors in employee eOPFs that create complications in disseminating federal benefits in a timely fashion and may result in benefits going to unintended recipients. To minimize such errors in the future, GTM/OCA developed a checklist to help employees review and update their personnel information. The goal is to help employees review their personnel records for accuracy by providing the necessary steps to correct inaccuracies or outdated information.

Background:

GTM/OCA provides administrative assistance and ongoing support following a serious incident (injury, illness, or death) involving a U.S. direct-hire Department of State (DoS) employee (Civil Service and Foreign Service) serving in the United States or overseas, and Eligible Family Members (EFMs) on travel orders overseas. GTM/OCA provides beneficiaries of deceased employees with information and assistance about federal employee benefits, such as: unpaid compensation, Federal Employee Group Life Insurance (FEGLI), Thrift Savings Plan (TSP), and federal death benefits. GTM/OCA facilitates the necessary steps to ensure

employees and their families receive the dedicated support/resources they need in a time of grief.

Every employee should regularly review their eOPF, and especially after a life change (marriage, divorce, having a child, death of a named beneficiary, etc.), and then again after making changes to designation of beneficiary information or updating documents within their eOPF. After sending updated designation of beneficiary forms to HRSC@state.gov, the employee will receive an automated confirmation email. Employees should also maintain the original forms. Properly completed designations of beneficiary forms are not effective until HRSC receives and certifies them before the employee/insured's death.

Questions and Contacts:

- If questions remain after reviewing this message, please contact HRSC@state.gov or by telephone at 1-866-300-7419.
- Questions or concerns about updating documents in eOPF may be directed to the eOPF Team at: opf@state.gov.
- Questions or concerns related to participation in specific retirement plans should be directed to HRSC@state.gov.
- Learn more about GTM/OCA and find other useful information and support resources via the [OCA website](#). Questions pertaining to OCA can be sent to OCA@state.gov.
- Report a serious incident by immediately notifying the State Department Operations Center (phone: 202-647-1512; email: SES-O@state.gov); your Regional Bureau Executive Office; and OCA (email: OCA@state.gov).

Checklist for Reviewing Your Electronic Official Personnel File (eOPF)

1. Administrative and Retirement Documents: Checking for corrections

- Go to [HR Applications](#), then under “Self-Service” click on “My eOPF” and click on “Administrative Documents” and/or “Retirement Documents” and review the documents below

NOTE: Prior forms are not removed from the eOPF; the form with the most recent date is the official document

A. Review your Designation of Beneficiary forms

- Ensure each Designation of Beneficiary form corresponds to the correct benefit (see #4 for a list of beneficiary forms)

NOTE: Retirement Systems for FS and CS have different beneficiary forms; if you submit the wrong form for your retirement system, the designation is not valid (see #2, b)

- Ensure the name(s) on the form is the person(s) you currently want to be the beneficiary(ies)

NOTE: See B to submit a new Designation of Beneficiary Form

- Check to see if you signed and dated the form

NOTE: The form is not valid unless it has your signature

- Check for erasures, cross-outs, or alterations, which may cause a delay in payment or

make the form invalid

B. To submit a new Designation of Beneficiary form:

- Read and follow specific instructions on each form before designating beneficiaries

NOTE: Blank forms can be found here: [Designation of Beneficiary Forms](#)

- Employees can change beneficiary forms at any time, without the knowledge or consent of a previous beneficiary

NOTE: If more than one named beneficiary, the percentage must total exactly **100%**

- Employee (the Insured) signs and dates the forms, otherwise the form is invalid.

NOTE: Signatures must be original, electronic signatures are not permitted

- Witnesses are required, follow the specific instructions on each form

NOTE: Two people witness the employee's signature and sign as witnesses

- Witness signatures must be original/handwritten, electronic signatures are not permitted on beneficiary forms
- A witness is ineligible to receive payment as a beneficiary
- Employee cannot witness their own form
- HR Officers/Specialists signing as authorizing officials cannot also sign as a witness
- Employee provides the Designation of Beneficiary Form(s) to an HR authorizing official/Bureau HR Service Provider for signature or sends directly to HRSC

NOTE: HR authorizing official's signature should be legible and not with initials

- Send the updated/new forms to the HR Service Center (HRSC) to be scanned and retained in eOPF:

Scan, email, or fax the completed updated forms to:

HR Service Center at HRSC@state.gov

or fax to 843-202-3807

- After one month, visit your eOPF to ensure that the new form(s) has been scanned and included in your eOPF

NOTE: If you have questions, email HRSC@state.gov or call 1-866-300-7419

2. SF-50/Notification of Personnel Action: Checking for Corrections

- Go to [HR Applications](#), then under "Self-Service," click on "My eOPF," then click on "Administrative Documents," and click the SF-50/Notification of Personnel Action documents button.
- Note: review most recent SF-50 Notification of Personnel Action

A. Federal Employee Group Life Insurance (FEGLI):

- Find Box 27 and ensure FEGLI amount corresponds to your most recent FEGLI election form (SF 2817)

- Check the FEGLI deductions on your earnings and leave statement in [Employee Express](#); they should be the correct premium amount for the coverage you have. FEGLI premium rates can be found on [OPM website for FEGLI premium rates](#)
- That FEGLI election should also match your latest FEGLI election form (SF 2817) located in eOPF

NOTE: Any FEGLI errors can be reported to your Bureau HR Service Provider or Bureau HR Office

B. Retirement Information:

- Find Box 30 to locate the retirement system you are in
- Ensure you have completed the corresponding designation of beneficiary form for your retirement system (see #4)

3. Find and review your FEGLI Election Form (SF 2817)

- Go to [HR Applications](#) to access “My eOPF” and click on FEGLI Election form

NOTE: Employees must have Basic, in order to elect option A, B, C

- Employees must sign in each signature block for elected option

NOTE: SF-50 lists FEGLI coverage in block 27

- Authorizing official and employee (the Insured) must sign/date the form for it to be valid

NOTE: See form for specific instructions

4. Designation of beneficiary forms include the following:

NOTE: Employees should review all of the below forms for correctness and follow specific instructions provided on each form

- **SF-1152, Unpaid Compensation** includes final salary and unused annual leave (applicable to FS, CS, EFM, PSC) and can be found in eOPF. Send new/updated forms to HRSC@state.gov
- **SF-2823, FEGLI** (anyone who has FEGLI) and can be found in eOPF. Send new/updated forms to HRSC@state.gov
- **SF-3102, Federal Employee Retirement System (FERS)** for FERS, FERS RAE, FERS FRAE employees (CS, EFM) and can be found in eOPF. Send new/updated forms to HRSC@state.gov
- **DS-5002, Foreign Service Retirement and Disability System (FSRDS)** and the **Foreign Service Pension System (FSPS)** for FS and can be found in eOPF. Send new/updated forms to HRSC@state.gov
- **SF-2808, Civil Service Retirement System (CSRS)** for CS employees and may be found in eOPF. However, CSRS employees must send new/update forms to U.S. Office of Personnel Management, Retirement Operation Center, P.O. Box 45,

Boyers, PA 16017-0045

- **TSP- 3, Thrift Savings Plan** (TSP), is not maintained in eOPF, employees sends directly to TSP (FS, CS, EFM). To review TSP beneficiary information, call the TSP at 1-877-968-3778. New TSP-3 Designation of Beneficiary forms should be sent directly to TSP as explained on the form, which is available at www.TSP.gov

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