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Subject: Retirement Credit for Prior Federal and Military Service

This is the first in a series of annual notices concerning the retirement process.

Key Points:

- If you had federal civilian or military service prior to joining the Department of State, you can increase your Foreign Service or Civil Service pension by obtaining credit for (also known as "buying back") that service.
- Prior service time is not credited automatically. You must apply at least a year prior to your planned retirement.
- Initiating the "buy back" application process does not obligate you to finalize the process by making a deposit. Instead, you can make that decision once the Office of Retirement (GTM/RET) has calculated your required payment and an annuity estimate.
- For more information on prior service credit, please see the GTM/RET SharePoint pages for [Prior Federal Service Credit](#) and [Military Service Credit](#). If you still have questions, please e-mail GTM/RET at HRSC@state.gov.

Top Questions:

- [What Is My Creditable Service And Retirement Service Computation Date \(SCD\)?](#)
- [Can I Receive Retirement Credit For Prior Military Or Federal Service?](#)
- [When Should I Apply?](#)
- [How Do I Get Credit For My Military Service?](#)
- [How Do I Get Credit For Prior Federal Civilian Service?](#)
- [What Happens If I Move From The Civil Service To The Foreign Service \(Or Vice Versa\)?](#)

What Is My Creditable Service and Retirement Service Computation Date (SCD)?

1. Your retirement service computation date (SCD) determines when you can retire and how much annuity you will receive. The annual leave service computation date (SCD) is reflected in block #31 of the Standard Form (SF50) and determines the amount of annual leave earned each pay period. However, it is the retirement SCD that determines the total amount of federal service used for retirement eligibility and computation purposes.

Note the following may affect your retirement SCD:

- Excess leave without pay (LWOP);
- Federal service requiring a deposit that has not been paid;
- Temporary service performed after 1989 (FERS and FSPS only); and
- Breaks in federal service in excess of three days.

2. When using the [Employee Retirement Portal \(ERP\)](#) under [HR Applications](#) to compute a retirement annuity estimate, the software may default to your annual leave SCD. While there is no difference between the annual leave and retirement SCDs for those who have no prior federal service, employees who have prior federal service MUST request the calculation of their retirement SCD by submitting a request to HRSC@state.gov. Once your request is submitted, GTM/RET will calculate your retirement SCD and process a personnel action that places the correct retirement SCD in GEMS, which is then used by ERP to calculate your annuity estimates.

Can I Receive Retirement Credit for Prior Military or Federal Service?

3. If you had federal civilian or military service prior to joining the State Department, you can potentially increase your Foreign Service or Civil Service pension by obtaining credit for that service. Please note that prior service is not credited automatically. Employees must apply for prior service credit for retirement purposes -- a process that is distinct from the process by which prior service time is automatically added to a new employee's service computation date for leave accrual purposes.

4. In most cases, credit is obtained by making a deposit to cover the employee retirement contributions (plus interest) that were not made originally. Generally, no deposit is required to transfer Civil Service retirement credit to the Foreign Service

retirement fund (or vice versa); however, the employee must proactively request that transfer of funds (see below under How do I get Credit for Prior Federal Civilian Service).

When Should I Apply?

5. Eligible employees are encouraged to obtain credit for their prior military or civilian service long before they plan to retire. In most cases, delaying increases the interest charges that the employee must pay. Also, applications for prior service credit made shortly before retirement can delay the processing of the retirement application and payment of the initial annuity.
6. Initiating the process of applying to buy back prior service credit does not obligate the employee to finalize the process by making a deposit. Instead, the employee can make that decision once GTM/RET has calculated the required deposit and the incremental annuity the employee could potentially receive.

How Do I Get Credit for My Military Service?

7. In general, all military service is creditable if you served on active duty and received an honorable discharge. Inactive service in the reserves is not creditable, but active service during annual two-week training periods is creditable. Additionally, service at military academies is potentially creditable even if you are receiving retired military pay.
8. If you have already been awarded military retired pay based on a 20-year military retirement, your military service is not creditable for a federal civilian retirement annuity unless a military deposit is paid, and you waive your retired military pay at the time of retirement.
9. If you were awarded military retired pay at age 60 because of reserve service, you do not have to waive your military retired pay at retirement. Provided you pay the required deposit, credit for periods of active-duty military reserve service will be included in your civilian retirement annuity.
10. To apply for prior military service credit, you must first obtain a record of your military pay history from the pay center of your former branch of service. To do so, fill, print and sign form [RI-20-97](#) (Estimated Earnings during Military Service). On the form, you will find a list of military pay offices. Once you find the address for your former

branch of service, send your signed [RI-20-97](#) along with your Discharge Papers and Separation Documents (form DD-214) or other documentation of service to that address. Employees who do not have their DD-214 must first obtain a copy by sending a form [SF-180](#) to their former military records center.

11. Once the military pay center has completed the RI-20-97, you should submit it along with your DD-214 or other documentation of service to GTM/RET at HRSC@state.gov. Civil Service employees in the FERS retirement system must also submit form [SF-3108](#). GTM/RET will then calculate the military deposit amount required and inform the employee how and where to pay it. Once the employee completes the deposit and the Annuity Pay Processing Branch sends confirmation to GTM/RET, the employee's retirement file will be updated to reflect the paid military service.

How Do I Get Credit for Prior Federal Civilian Service?

12. Most types of prior **permanent** federal civilian appointments qualify for credit, including service as a Peace Corps or VISTA volunteer. Periods of service under a personal service contract or personal services agreement usually do not qualify for retirement credit, nor does work in Intermittent No Work Scheduled (INWS) status under the Family Member Appointment (FMA). Excluding service previously purchased under the PIT (part-time, intermittent, or temporary employment) Buyback Program that ended in 2008, most temporary service performed after 1988 is not creditable for retirement purposes. Special rules apply in other unusual circumstances, so inform GTM/RET of all prior service.

13. To receive retirement credit, you should first ensure that documentation of any previous federal employment showing your dates of service is on file in the administrative section of your Official Performance File (accessible via eOPF under [HR Applications](#)). If your eOPF is incomplete, you should send a copy of the missing documentation to U.S. Department of State, Records and Information Management Division, GTM/EX/RIM, SA-1 H804, 2401 E Street, NW, Washington, DC 20522-0108, FAX 202-663-1862, Email: eopf@state.gov for placing into the employee's eOPF.

What Happens If I Move From The Civil Service to the Foreign Service (or Vice Versa)?

14. In general, if you were covered under a Civil Service retirement plan prior to being appointed to the Foreign Service (or vice versa), there is no need to make an additional deposit for that credit (unless you received a refund of your retirement fund

contributions). However, paperwork must be done to transfer funds between the two retirement accounts. To request the transfer, you should e-mail HRSC@state.gov to have the Civil Service retirement funds transferred to the Foreign Service retirement fund (or vice versa). The process of transferring funds can take some time to complete, so it is best to initiate the process at least one year prior to retirement.

15. If you received a refund of your retirement contributions made during prior federal service, but now wish to redeposit that amount, you may need to repay that money back with interest for that service to be creditable for computing your annuity. Please e-mail HRSC@state.gov to initiate a review of your case by GTM/RET.

16. Below are the application procedures for making a deposit for civilian service that was not subject to withholding. They differ according to which retirement plan you are in:

- **Foreign Service Pension System (FSPS):** Employees in FSPS may make a deposit for prior civilian service that was not subject to retirement deductions only if that service occurred prior to 1989. This rule does not apply to Peace Corps or VISTA service for which a deposit can be made at any time. To submit a prior service application, submit the request to HRSC@state.gov. GTM/RET will determine the deposit amount and will explain how to make that payment. Once the employee completes the deposit and the Annuity Pay Processing Branch sends confirmation to GTM/RET, the employee's records will be updated to reflect the paid civilian service.
- **Foreign Service Retirement and Disability System (FSRDS):** Employees in FSRDS who performed prior civilian service during which no retirement deductions were withheld or were refunded, may buy back credit. To submit a prior service application, submit the request to HRSC@state.gov. GTM/RET will determine the deposit amount and will explain how to make that payment. Once the employee completes the deposit and the Annuity Pay Processing Branch sends confirmation to GTM/RET, the employee's records will be updated to reflect the paid civilian service.
- **Federal Employees Retirement System (FERS):** Civil Service employees in FERS may buy back credit for prior civilian service only if it occurred prior to 1989. This rule does not apply to Peace Corps or VISTA service, for which a deposit can be made at any time. To apply for credit, submit Form [SF-3108](#) to GTM/RET.

GTM/RET will review, certify, and forward the [SF-3108](#) to the Office of Personnel Management (OPM). OPM determines the deposit amount owed and will explain how to make payment. Since the employee pays the deposit to OPM, OPM will notify the employee when payment has been completed. Once OPM's payment confirmation is received, the employee should send a copy to GTM/RET so that the employee's State Department retirement file is updated to reflect the paid civilian service.

- **Civil Service Retirement System (CSRS):** Civil Service employees in CSRS who performed prior civilian service during which no retirement deductions were withheld, may buy back credit. To apply for credit, submit Form [SF-2803](#) to GTM/RET. GTM/RET will review, certify, and forward the [SF-2803](#) to OPM. OPM determines the deposit amount owed and will explain how to make payment. Since the employee pays the deposit to OPM, OPM will notify the employee when payment has been completed. Once OPM's payment confirmation is received, the employee should send a copy to GTM/RET so that the employee's State Department retirement file is updated to reflect the paid civilian service.

Additional Information

17. For more information on prior service credit, click on the "Resource Library" tab in the [Employee Retirement Portal](#) under [HR Applications](#) as well as the GTM/RET SharePoint pages for [Prior Federal Service Credit](#) and [Military Service Credit](#). If questions remain after reviewing that information, please e-mail GTM/RET at HRSC@state.gov.

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