EMPLOYEE CHECKLIST FOR CSRS RETIREMENT APPLICATION

To prevent delays in processing your retirement application, it is important for you to submit all required forms. This checklist should be included on top of your retirement application and submitted *at least 90 days prior* to your retirement effective date to the TSA HCAccess Shared Service Center.

Name (last, first, middle): **Retirement Date:**

SF-2801 - Application for Immediate Retirement (CSRS) http://www.opm.gov/Forms/pdf_fill/SF2801.pdf

This application needs to be completed in order to apply for retirement benefits. All questions must be answered, all applicable boxes checked, and all areas requiring initials must be initialed.

1. **Marital Information** – In Section E, you must complete #1 & #2. Provide information and answer Court Order question. You will also need to provide a copy of your marriage certificate.
2. **Annuity Election** – In Section F, whether you are married or not, you must select an Annuity Election.
3. **Annuity Election** - If you are married and elected less than the full survivor annuity, then you must submit the Spouse's Consent to Survivor Election. The Spouse's Consent Election must match the election in Section F, and the date the spouse signs must match the date the notary signs.
4. **Applicant's Certification** – In Section I, sign and date the Applicant's Certification and complete the Applicant's Checklist.
5. **Schedules A, B, and C** – Complete, sign and date the Applicant's Certification.

SF-2818 - Continuation of Life Insurance Coverage http://www.opm.gov/forms/pdf_fill/SF2818.pdf

This form needs to be completed if you are enrolled in the Federal Employees' Group Life Insurance (FEGLI) Program.

6. **Basic Life Insurance** – Complete #7 & #8. Elect if you want to continue coverage or "I received a full Living Benefit." If applicable, elect what level of Basic you want.
7. **Option A** - Complete #9. Elect if you want to continue Option A or select "I don't have Option A."
8. **Option B** – Complete #10 & #11. Elect if you want to continue Option B or select "I don't have Option B." If applicable, indicate the number of NO REDUCTION or FULL REDUCTION multiples you want in retirement.
9. **Option C** – Complete #12 & #13. Elect if you want to continue Option C or select "I don't have Option C." If applicable, indicate the number of NO REDUCTION or FULL REDUCTION multiples you want in retirement.
10. **Signature** – In block #14 sign and date the form.

W-4P - Withholding Certificate for Pension or Annuity Payments http://www.irs.gov/pub/irs-pdf/fw4p.pdf

This form tells OPM the correct amount to withhold in Federal income taxes from your annuity.

DD Form 214 – Certificate of Release or Discharge from Active Duty

Please provide a DD-214, *Certificate of Release or Discharge from Active Duty*, or an equivalent document for all periods of active duty with beginning and ending dates for each period even if it is not used in your civilian retirement.

Form AD-349 - Employee Address

If your home address will change from the address of record with TSA, please submit a change of address by completing Form AD-349, *Employee Address*, prior to retiring.

Submit completed retirement package to:
TSA HCAccess Shared Service Center
ATTN: Retirement Team • FAX: 877-872-7993 or Email: HelpDesk@mailserver-hraccess.tsa.dhs.gov (password protected) Questions?
Call the HCAccess Help Desk at 877-872-7990 (TTY: 877-872-7992) or email HelpDesk@mailserver-hraccess.tsa.dhs.gov