HAWAII NATIONAL GUARD
HUMAN RESOURCES OFFICE
BULLETIN

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ANNUAL ADMINISTRATIVE PAPERWORK CHECKLIST

The Annual Checklist is provided as a reminder to some, and a new idea to others. In many instances, employees forget to update their benefits paperwork and discover that they had not reviewed or updated their information since they first came on board with their employing agency. In an effort to keep employees up to date, we ask that you request your service population to check their administrative paperwork.

The Federal Employees Group Life Insurance offers optional life insurance and deductions increase with age. The age increase occurs in 5-year increments. Increases in amounts of coverage are not permitted without obtaining a qualifying life event, such as birth of a child, adoption, marriage, and divorce. However, decreases in coverage are permitted at any time. Employees may wish to review this information prior to the incremental change to reconsider their needs and the needs of their family and make appropriate changes.

An annual checklist is included in this newsletter as a reminder for employees to review and possibly increase their TSP contributions to ensure employees are taking advantage of the annual elective deferral limits. Electing changes earlier in the year offers employees the option to spread deductions over a longer period.

The checklist will remind employees to verify all the benefit documents and benefits information that should be checked or considered as part of their annual review of applicable forms, and benefits that may be affected by an increase in age, annual contributions or life style changes. The checklist may be retained by the employee for their personal records, and shared with their spouse or persons who have an insurable interest.

Using this checklist to review and make the necessary modifications will help to ensure that employees are aware of and in control of his or her benefit options, and that current benefit elections are what he or she intends.

ANNUAL ADMINISTRATIVE PAPERWORK CHECKLIST

LEAVE and EARNING STATEMENTS

1. ____ Leave and Earning Statement (LES) for the following deductions to ensure they are accurate and the affect that any open season or salary changes may have on benefit deductions.

☐ Federal Employees Health Benefit (FEHB)

☐ Federal Employees Group Life Insurance (FEGLI) (rates increase automatically based on age in 5-year increments & salary)

☐ Flexible Spending Account (FSA)

☐ Federal Employee Dental and Vision Insurance Program (FEDVIP)

☐ Thrift Savings Plan (TSP). Increasing TSP based on the maximum annual allowance is easier financially if made during the 1st few pay periods of the year rather than later in the year because the deductions are spread out over a longer period of time.

☐ Sick and Annual Leave balances (to ensure accurate account balances transfer properly)

STANDARD FORM 50

2. ____ SF50 (Notification of Personnel Action) to ensure the following data is accurate. The value of these data elements may affect your leave accrual, retention standing, retirement deductions, wages, and premiums for benefits. In most cases SF50's from your Electronic Official Personnel Folder. For assistance in locating your most recent SF50, contact the HRO Benefits Section.

☐ FEGLI Code (Block 27)*

☐ Service Computation Date (block 31)*

☐ Veterans Preference ((block 26)

☐ Retirement Code (block 30)*

☐ Duty station location (block 39)

☐ Pay Plan or Pay Band (block 16-19)*

☐ Grade and Step or level (block 16-19)*

☐ Basic, Locality, and Total Adjusted Salary (block 20, 20A-20D)*

***Notates that this information can also be found on LES**

CURRENT ADDRESS

3. ____ Ensure your servicing human resources office and payroll office have the most current mailing and Email address so that W2 forms, Wage and Tax Statements, insurance carrier and TSP information can be received at the proper address.

4. ____ W4, Employee's Allowance Certificate and applicable state tax forms. Does your tax withholding need to be adjusted due to salary increases? If so, use the IRS Withholding Calculator to determine the necessary adjustments then complete and submit a new W-4 to your servicing Human Resource Office. The calculator can be found at http://www.irs.gov/individuals/article/0id=96196,00.html

BENEFICIARY FORMS

5. ____ Beneficiary Forms. The Federal government recognizes most recently dated beneficiary forms, assignments or valid court orders. Wills or power of attorney documents do not override these forms. If you want to ensure that your survivors receive the timely notification of benefits and payments, it is important that you complete the appropriate designation of beneficiary form in the manner in which you want those payments distributed. If beneficiary forms are not completed, the order of precedence applies at the time of death.
Most beneficiary forms can be found on the www.opm.gov/forms and www.tsp.gov websites.

- ☐ SF2808, CSRS or SF3102 FERS (Use the appropriate form depending upon which retirement system you are under. The Office of Personnel Management will pay retirement funds to survivors and eligible dependents.)
- ☐ SF2823, Federal Employees Group Life Insurance (includes payment upon death for all life insurance coverage options. Payments are made by the Office of FEGLI)
- ☐ SF1152, Unpaid Compensation (includes payment for monies due employee, i.e., salary, annual leave balance, and travel reimbursements)
- ☐ TSP-3, Thrift Savings Plans (used by the TSP Board to pay TSP account balance)

Benefit Office is: (808)672-1006, option 3.

Electronic Forms should be sent to: ng.hi.hiarng.mbx.nghi-hro-benefits@mail.mil