



Application to Make Deposit or Redeposit

Civil Service Retirement System

To avoid a delay in processing your claim:

1. Read the attached information carefully.
2. Type or print in ink.
3. Complete Part A in full. If you are currently a Federal employee, have your employing agency complete Part B.

Part A. To be Completed by the Applicant

| | | |
|--|--|---|
| 1. Name (<i>Last, first, middle</i>) | 2. List other names you have used | 3. Birthdate (<i>mm/dd/yyyy</i>) |
| 4. Address (<i>Number and street</i>) <i>(City, state and ZIP Code)</i> | 5. Department or agency in which presently or last employed, including bureau, branch, or division | 6. Social Security Number |
| 9. Have you previously filed any application under the Civil Service Retirement System (CSRS)? <input type="checkbox"/> Yes, complete items 9a and 9b <input type="checkbox"/> No | 7. Location of employment (<i>city and state</i>) | 8. Title of position |
| 10. I am applying to make a service credit payment for: | 9a. Type of application <input type="checkbox"/> Service credit payment <input type="checkbox"/> Refund <input type="checkbox"/> Voluntary Contributions Account <input type="checkbox"/> Retirement <input type="checkbox"/> Military Service (<i>Go to item 11</i>) | 9b. Claim number(s) [<i>if available</i>] |

List below in chronological order all periods of Federal civilian service. Be sure all your service is listed so that the Office of Personnel Management (OPM) can bill you for the correct amount.

| Department or Agency <i>(including bureau, branch or division where employed)</i> | Location of Employment <i>(city and state)</i> | Title of Position | Periods of Service | | Check whether deductions were not withheld, withheld and refunded, or withheld and remain to your credit | | | Put a check mark (✓) in the boxes below, next to the periods of service you want to pay for. (If you do not want to pay for a specific period of service, leave the box blank.) |
|--|---|-------------------|---------------------------------------|------------------------------------|--|-----------------------|---------------------------|---|
| | | | Beginning Date <i>(mm/dd/yyyy)</i> | Ending Date <i>(mm/dd/yyyy)</i> | Not Withheld | Withheld and Refunded | Withheld and Not Refunded | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |

| | |
|---|---|
| 11. Are deductions for the Civil Service Retirement System now being withheld from your salary? <input type="checkbox"/> Yes (<i>Go to item 13</i>) <input type="checkbox"/> No (<i>Go to item 12</i>) | 12. Give the date of separation from your last position under the Civil Service Retirement System <div style="text-align: right;"><i>Date of separation (mm/dd/yyyy)</i> →</div> |
| 13. Signature of applicant | 14. Email address |
| 15. Telephone number (including area code) where you can be reached during the day () | 16. Date (<i>mm/dd/yyyy</i>) |

B. To Be Completed by the Employing Agency

Instructions to the Agency - This application is not to be used as a means for verifying service for leave, retention or other non-retirement purposes. The procedures for verifying service for establishing creditability of service are contained in Chapter 20 of the CSRS/FERS Handbook. If more space is needed for information requested in Item 3, please attach a separate sheet. Show the name and Social Security Number of the applicant on the separate sheet (SF 2801-1 may be used for this purpose).

| | |
|--|--|
| 1. Is the employee in a position subject to civil service retirement coverage? <input type="checkbox"/> No <input type="checkbox"/> Yes | 2. Exact date civil service retirement deductions began for the current appointment <i>(mm/dd/yyyy)</i> |
|--|--|

3. **Civilian Service Not Under a Retirement System for Federal Employees**

From verified service documented in official personnel records, list any Federal civilian service not subject to a retirement system for Federal (or D.C. Government) employees. If total basic salary earned for any such period is known, a summary entry may be entered on the right-hand side below. Otherwise, show each change affecting basic salary during the period of service. Any period of nondeduction service claimed on the front of this form which cannot be verified from official records should be listed and noted in the "Leave Without Pay" column as "Unverified." NOTE: This information will also be requested (on the SF 2801-1) in connection with the employee's retirement. The agency should keep a copy of this schedule to facilitate completion of the SF 2801-1.

| Nature of action <i>(Appt., pro., res., etc.)</i> | Effective date <i>(mm/dd/yyyy)</i> | Basic salary rate | Salary basis <i>(per annum, per hour, WAE, etc.)*</i> | Leave without pay | If basic salary actually earned is available, make summary entry below. | | |
|--|---------------------------------------|-------------------|--|-------------------|---|---------------------------|--------------|
| | | | | | From <i>(mm/dd/yyyy)</i> | To <i>(mm/dd/yyyy)</i> | Total Earned |
| | | | | | | | |

* If part-time, provide the number of hours in the scheduled tour of duty and dates of each change in tour of duty. If employee claims to have worked more than the scheduled tour(s), provide number of hours worked at each pay rate. If intermittent (WAE), provide the number of hours or days worked, if available, at each pay rate.

Certification - The information entered above is based on official records of this agency and is correct. There is no official personnel or fiscal record in this agency of the additional service (if any) alleged by the employee and marked "Unverified" in item 3.

| | | |
|----------------|---|---|
| Agency address | Signature | Date <i>(mm/dd/yyyy)</i> |
| | Official title | Email address |
| | Telephone number <i>(including area code)</i> () | Fax number <i>(including area code)</i> () |

Privacy Act and Public Burden Statement

Solicitation of this information is authorized by the Civil Service Retirement law (Chapter 83, title 5, U.S. Code). The information you furnish will be used to determine your eligibility to make deposits or redeposits to the Civil Service Retirement and Disability Fund, to identify records properly associated with your application, to obtain additional information if necessary, and to maintain a uniquely identifiable claim file. The information may be shared and is subject to verification, via paper, electronic media, or through the use of computer matching programs, with national, state, local or other charitable or social security administrative agencies in order to determine benefits under their programs, to obtain information necessary for determination or continuation of benefits under this program, or to report income for tax purposes. It may also be shared and verified, as noted above, with law enforcement agencies when they are investigating a violation or potential violation of civil or criminal law. Executive Order 9397 (November 22, 1943) authorizes the use of the Social Security Number. Failure to furnish the requested information may delay or make it impossible for us to determine your eligibility to make payments.

We estimate this form takes an average 30 minutes per response to complete, including the time for reviewing instructions, getting the needed data, and reviewing the completed form. Send comments regarding our estimate or any other aspect of this form, including suggestions for reducing completion time, to the Office of Personnel Management (OPM), Retirement Services Publications Team (3206-0134), Washington, DC 20415-3430. The OMB Number 3206-0134 is currently valid. OPM may not collect this information, and you are not required to respond, unless this number is displayed.

Information Regarding Deposit and Redeposit

Civil Service Retirement System

Detach this information sheet before filling out the application.

Read this information carefully before filling out the attached application.

Who Should Use This Application?

You should use this application if you are covered by the Civil Service Retirement System (CSRS) and you want to pay a deposit or a redeposit for civilian service. You should **not** use this application if you are covered by the Federal Employees Retirement System (FERS).

Credit for Military Service Performed After December 31, 1956

To make payment for military service performed after December 31, 1956, refer to the instructions on SF 2803A, *Application to Pay Military Deposit*, which is part of this package. Only current CSRS-covered employees may apply to pay military deposits.

What You Should Know About Deposit for Civilian Service Under CSRS

Deposit is a payment to the retirement fund to cover a period of civilian service during which no retirement deductions were withheld from your salary (also called "nondeduction" service).

You do not have to make a deposit if you do not wish to do so. However, if you do not make the deposit —

- **For nondeduction service performed before October 1, 1982**, you will receive credit toward your retirement annuity. Your annuity will be permanently reduced by 10% of the amount due as a deposit. For example, if a deposit of \$600 is required and it is not paid, the annuity is permanently reduced by \$60 a year (or \$5 a month). On the other hand, if a deposit of \$600 is made, it will increase the annuity by \$60 a year.
- **For nondeduction service performed on or after October 1, 1982**, you will receive no credit in the computation of your annuity. The period of service will be creditable for title and average salary purposes whether or not a deposit is made.

The amount of your deposit will be the percentage of your basic salary shown below, plus interest.

| <i>Dates of Service</i> | <i>Deduction Rate</i> |
|---|-----------------------|
| July 1, 1926, and June 30, 1942 | 3.50% |
| July 1, 1942, and June 30, 1948..... | 5% |
| July 1, 1948, and October 31, 1956 | 6% |
| November 1, 1956, and December 31, 1969 | 6.50% |
| January 1, 1970, and December 31, 1998 | 7% |
| January 1, 1999, and December 31, 1999 | 7.25% |
| January 1, 2000, and December 31, 2000 | 7.40% |
| After December 31, 2000 | 7% |

(Certain special categories of employees are subject to higher percentage deductions as specified in 5 U.S.C. 8334.)

What You Should Know About CSRS Redeposit

Redeposit is a payment to the retirement fund to cover a period of service for which retirement reductions were withheld from your salary and later refunded to you.

You do not have to make a redeposit if you do not wish to do so. However, if you do not make the redeposit —

- **For service which ended on or after or March 1, 1991**, you will receive no credit in the computation of your annuity for the period of service covered by the refund. This usually results in a reduction in the amount of your annuity, or, in the event of death, your eligible widow's (or widower's) annuity. The period of service will be creditable for title and average salary purposes whether or not a redeposit is made.
- **For service which ended before March 1, 1991, if your final separation occurred on or after October 29, 2009**, you will receive credit in your annuity computation for the period of service covered by the refund.

If you do not pay the redeposit for this service, your annuity will be permanently, actuarially reduced because the redeposit is not paid. The amount of the reduction will be based on factors which will be divided into the amount of redeposit and interest you owe at retirement.

- **If you retire on disability**, you will not receive credit for service with unpaid redeposits. This means that should you retire because of a disability, you could find that you must pay for the service to receive credit for it and that the accrual of interest has increased the amount you must pay.

The amount of redeposit will be the sum of the refund plus interest from the date the refund was paid to the date of redeposit (or commencing date of annuity, whichever is earlier).

How Interest Is Computed on Deposits

Interest is computed on the deposit from the midpoint of each period of nondeduction service.

- Interest for nondeduction service performed before October 1, 1982, accrues **daily** and is charged at the following rates, compounded annually:
 - 4 percent through December 31, 1947; and
 - 3 percent from 1948 through the date the deposit is made or to the commencing date of annuity, whichever is earlier.

Additional interest does not accrue if payment is made in full within 30 days after the Office of Personnel Management (OPM) issues the billing statement.

- Interest for nondeduction service performed on or after October 1, 1982, accrues **annually**, is compounded annually on December 31 of each year, and is charged at the following rates:
 - 3 percent through December 31, 1984; and
 - At a variable rate determined annually by the Department of Treasury beginning January 1, 1985. The variable interest rate for any year equals the overall average yield to the fund from retirement securities during the preceding fiscal year.

No interest is charged for a year when payment in full is received by December 31 of that year.

How Interest Is Computed on Redeposits

Interest is computed on the redeposit from the date the refund was paid.

- If the refund was based on an application received by the employing agency or OPM before October 1, 1982, interest on the redeposit accrues **daily** beginning on the date the refund was paid and is charged at the following rates, compounded annually:
 - 4 percent through December 31, 1947; and
 - 3 percent from 1948 through the date the redeposit is made, or to the commencing date of annuity, whichever is earlier.

Additional interest does not accrue if full payment is made within 30 days after the billing statement is issued.

- If the refund was based on an application received by the employing agency or OPM after September 30, 1982, interest is charged beginning on the date the refund was paid, at the following rates, compounded annually:
 - 3 percent through December 31, 1984; and
 - A variable rate determined by the Department of Treasury beginning January 1, 1985. The variable rate for any year equals the overall average yield to the fund from retirement securities during the preceding fiscal year.

For post-September 30, 1982, refunds, interest is not charged for a year when payment in full is received by December 31 of that year.

Procedures Governing Civil Service Retirement System (CSRS) Deposit And Redeposit

Deposits and redeposits can be made by employees now serving under the CSRS, by separated employees who are entitled (or would be entitled after paying for service) to an annuity, or by eligible widows, widowers, or former spouses of deceased employees. An applicant for retirement is automatically given an opportunity to make the deposit for nondeduction service performed on or after October 1, 1982, and any redeposit when the application for retirement is processed. An applicant for retirement must specifically request an opportunity to make a deposit for nondeduction service performed before October 1, 1982. **An employee should not file an application to make deposit or redeposit if he or she contemplates retirement within six months.**

If you are employed by the Federal or District of Columbia Government, you must send your completed application to your department or agency first because they must certify it.

If you are separated from the Federal or District of Columbia Government, send your completed application directly to the Office of Personnel Management, Retirement Operations Center, Deposit Section, P.O. Box 45, Boyers, PA 16017-0045.

Instructions for making payment together with a statement for the amount due will be sent to you as soon as the processing of your application is completed.

Installment payments of at least \$50 are acceptable. However, interest accrues on the unpaid balance. You may authorize direct debit payments. You will receive information about how to authorize direct debit payments when you receive your statement.

Specify the service you want to pay for. Contact your retirement counselor to discuss the advantages of paying for one period of service over another before you make your decision. After you have paid in full for the period of service you select, please notify us if you want us to bill you for any other service.

You cannot withdraw the payments you make unless you become eligible for and obtain a refund of all your retirement deductions.

Additional information and assistance in completing this application may be obtained from the personnel office of the Government department or agency in which you are employed. If this source of information is not available to you, contact the Office of Personnel Management, Civil Service Retirement System, Boyers, PA 16017-0045, or call us at 1-888-767-6738 (TTY: 1-855-887-4957) Monday through Friday from 7:30 AM to 7:45 PM Eastern Time.

Application To Pay Military Deposit For Military Service Performed After December 31, 1956

*You must be currently employed and covered under CSRS to make the military deposit.
You must complete the deposit in full before the separation on which your retirement benefit will be based.*

| | | |
|-----------------|----------------------------|------------------------|
| Employee's Name | Date of Birth (mm/dd/yyyy) | Social Security Number |
|-----------------|----------------------------|------------------------|

1. Information About Employee's Military Service

| <i>To Be Completed By Employee</i> | | | <i>Agency Use Only (To Be Completed By Agency HR Office)</i> | | |
|------------------------------------|---------------------------------------|------------------------------------|---|----|---|
| Branch of Military | Period of Service | | Does Alternative Deposit Calculation Under USERRA Apply? (Check appropriate box) | | Interest Accrual Date (IAD) (mm/dd/yyyy) |
| | <i>Beginning Date</i> (mm/dd/yyyy) | <i>Ending Date</i> (mm/dd/yyyy) | Yes | No | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | Certification: The information entered above is based on official records of this agency and is correct. | | |
| | | | Agency Official Signature | | Date (mm/dd/yyyy) |

2. Employee's Acknowledgment of Understanding of Military Service Credit and Deposit Rules

I am currently employed in a position where deductions for the Civil Service Retirement System (CSRS) are being deducted from my salary, and I wish to pay the deposit necessary to obtain credit for my military service after 1956. I understand that I must pay the entire deposit to my employing agency before separation for retirement. I further understand that the military deposit cannot be deemed paid at retirement if I am eligible for and elect an alternative annuity. If I do elect the alternative annuity upon retirement, any completed military deposits made to the Fund will be refunded to me along with any other retirement contributions or payments I made to the Fund. Once I complete the deposit in full, I understand that it can only be refunded to me if I become eligible for a refund of my retirement contributions or retire without waiving my military retired pay (if any).

I understand that for any given full period of military service that I have performed, if I do not complete the deposit for that full period of military service, any payments I made that were applied to that full period of military service will be refunded to me when I retire or when I become eligible for a refund of my retirement contributions. I also understand each of the following service credit rules and how they apply to any given full period of military service that I have performed for which I have not completed the military deposit:

- For each period of military service performed after 1956 :
 - If the first time I worked in a position where CSRS deductions were withheld from my salary was on or after October 1, 1982, the post-1956 military service will not be used to compute or establish title to CSRS annuity if I do not complete the deposit before I separate for retirement.
 - If the first time I worked in a position where CSRS deductions were withheld from my salary was before October 1, 1982, the post-1956 military service will not be used to compute my annuity at age 62 (or when I retire, if I retire after age 62), if I am eligible for Social Security benefits at that time.

Finally, I understand that payment of this deposit will not make my military service creditable if it is otherwise not creditable under CSRS. I realize that the Office of Personnel Management (OPM) is solely responsible for adjudicating and administering civil service retirement benefits. I understand that OPM will determine if my military service can be credited in my CSRS retirement when I apply for my retirement benefits.

| | | | |
|----------------------|---------------|--|-------------------|
| Employee's Signature | Email address | Telephone number where you can be reached during the day () | Date (mm/dd/yyyy) |
|----------------------|---------------|--|-------------------|

Information For Employee

Employee Instructions for Applying to Pay Post-1956 Military Service Deposit

- Complete sections 1-16 on the front of the SF 2803, *Application to Make Deposit or Redeposit*.
- Complete this form, SF 2803A, *Application to Pay Military Deposit for Military Service Performed After December 31, 1956*.
- Include a copy of your DD 214, *Report of Transfer or Discharge*, or equivalent record to verify your military service. If copies of the DD 214 are not available, you should complete form SF 180, *Request Pertaining to Military Records*, and send it to the appropriate address (found on the form) to verify your military service. You can obtain this form from your employing agency.
- Attach documentation of military basic pay to this application. (See below)
- Give the completed SF 2803, SF 2803A, and documentation noted above to your employing agency. Your agency will compute the military deposit you owe and give you instructions for paying the deposit.

Employee Instructions for Completing this Form (SF 2803A)

- Complete item 1 (Information About Employee's Military Service) by providing the branch of the military in which you served (e.g. Army, Navy, etc.) and the dates of your military service. If you have more than one period of military service, make a separate entry for each period of military service you performed. Note, a period of military service includes consecutive periods of service where there is no break in service. For military purposes, a 1-day break separates service into two periods. Your agency will complete the section relating to the alternative deposit computation rules and the interest accrual date.
- Read the information in item 2 and then sign and date the form, and provide a telephone number and email address where you can be reached during the day, at the bottom of item 2.

To Obtain Documentation of Military Basic Pay

Basic pay earnings may be documented by either of the following methods:

- Actual pay records from the military service. Your agency can tell you what military pay records are acceptable for documenting actual military earnings.
- Estimated earnings, if you do not have official records of military earnings for the entire period of service. To obtain these estimated earnings from the military, use RI 20-97, Request for Estimated Earnings During Military Service. You can obtain this form from your employing agency. You must attach a copy of your DD 214 for the period of military service and any available records of pay and promotions. If the alternative deposit calculation under USERRA applies to a period of military service, you should check with your agency for special instructions for requesting estimated earnings if you received civilian pay (military leave, annual leave) during your period of military service.

The following records may not be used to document earnings:

- Earnings statements from tax records. (They include allowances as well as basic pay.)
- Social Security earnings statements. (They include allowances as well as basic pay and also reflect only military basic pay earned up to the Social Security maximum wage base for withholding.)

Information For Employing Agency

Agency Instructions: The employing agency (or organization designated by the agency to administer the personnel records of the employee) must complete the Agency Use Only section for every application before the action is processed through payroll. The agency must indicate if the period is subject to the special comparative deposit calculation rules specified in the Uniformed Services Employment and Reemployment Rights Act (USERRA) of 1994, as amended, by checking the appropriate block (Yes or No) under the Does Alternative Deposit Calculation Under USERRA Apply? column. Do not leave that column blank. And, for each period of military service listed, the agency must provide the interest accrual date for the military deposit. Finally, an authorized agency official should sign and date the certification section.