	Optional Form OF-69 (10/08) t Agreement / of the Personnel Act of 1970 3371 - 3375)	Form Approved OMB No. 0960-0792	
	Instructions for Inc	oming Assignments	
This package applies to non-Federal employees co SSA.	oming to work at	Within 30 days of the effective date of the assignment, must be sent to:	one copy of this form
This agreement constitutes the written record of the oblig responsibilities of the parties to a temporary assignment a provisions of the Intergovernmental Personnel Act of 197	arranged under the	Executive & Special Services Staff Room 2510 Annex Building 6401 Security Boulevard Baltimore, MD 21235 Attn: IPA	
The term "State or local government", when appearing or institution of higher education, an Indian tribal governmen eligible organization.		Procedural questions on completing the assignment ag aspects relating to the mobility program may be addres	
Copies of the completed and signed agreement should be signatory.	e retained by each	Karen Makino Phone: 410-965-4473 Fax: 410-965-4391 Email: <u>karen.makino@ssa.gov</u>	
Incoming Agreement Extension Request Obligated Service Agreement Checklist	Page 1 - 9 Page 10 - 14 Page 15 - 16 Page 17 - 19		
PART 1 NATURE OF ASSIGNMENT	AGREEMENT		
1. Origin of Assignment Agreement (check all that apply)			
New Agreement Modification of existing ag	greement	Extension of existing agreement	
PART 2 INFORMATION ON PARTIC	IPATING EMPL	OYEE	
2. Name (<i>Last, First, Middle</i>)		3. Social Security Number	
4. Home Address (Street, City, State, ZIP Code)		5A. Has assignee served on a previous IPA as	signment?
5B. Dates of previous IPA assignment(s):			

PART 3 PARTIES TO THE AGREEMENT			
6. Federal Agency/DC Office/Component that is party to the agreement	7. Eligible Non-Federal Co-Sponsor		
8. Is assignment being made through a faculty fellows program?	plete 8A) 🗌 No (omit 8A)		
8A. Name of program			
PART 4 POSITION DATA			
A. Curre	nt Position		
9. Employment Office Name and Address (Building, Street, City, State and ZIP Code)	10. Employee's Position Title and 11. Office Phone No. (Area Code) Job Series		
	12. Immediate Supervisor (Name and Title)		
B. Current Ap	pointment Type		
13. Federal Employees (Check appropriate box.)	14. Non-Federal Employees		
Grade Level:	Salary: Original Date Employed by the Non-Federal Organization		
Salary:	(eligible non-Feds must have been employed at least 90 days)		
C. Position to Which A	ssignment Will Be Made		
15. Employment Office Name and Address (Building, Street, City, State and ZIP Code)	16. Employee's Position Title 17. Office Phone No. (Area Code)		
	18. Immediate Supervisor (Name and Title)		
PART 5 TYPE OF ASSIGNMENT 19A. Check appropriate Box	20. Period of Assignment (Month, Day, Year)		
On detail from a Federal Agency			
On leave without pay from a Federal Agency	From: To:		
On detail to a Federal Agency			
On appointment in a Federal Agency			
19B. Eull Time			
Part Time			

PART 6 REASON FOR MOBILITY ASSIGNMENT

21. Indicate the reasons for this mobility assignment and discuss how the work will benefit the participating Federal and non-Federal co-sponsoring organizations. In addition, indicate how the employee's newly acquired skills will be utilized at the completion of this assignment.

PART 7 POSITION DESCRIPTION

ГАГ		IN DESCRIPTION			
Major	duties and responsi	bilities to be performed while on the mo	bility assignment (comp	olete 22-A or 22-B).	
22A.	Unclassified	duties described below approximate le	vel of difficulty of dues o	f permanent assignment:	
22B.	A classified c	lescription of duties is attached for:			
	LWOP/appoi	ntment assignment			
	detail assign	ment significantly different from duties	of permanent assignmer	nt	
PAR	T 8 EMPLOY	EE BENEFITS			
23. Ra	ate of annual basic	bay during assignment \$	(12 mc	os.)	
24. Sp	ecial Conditions	merit pay adjustment for this as	signee) and benefit cos	ts will be reported on quarterly o	er a prescribed length of service, or as a r other periodic billing between co- vision of this agreement document.
		Other:			
		Employee will observe holidays	: Federal	Other (specify)	Both
25A. A	Annual leave benefit	ts for which assigned employee is eligit	ble:		
25B. S	Sick leave benefits f	or which assigned employee is eligible			
25C. (Official authorized to	approve annual or sick leave:			
	Periodic time and att one, and written cor	endance reports to be provided by nfirmation to follow:	Every:		(not applicable)

PART 8 EMPLOYEE BENEFITS (Continued)

25E. Co-Sponsor officials designated to communicate time and attendance information:

	Reporter		Receiver
Name:		Name:	
Title:		Title:	
Telephone:		Telephone:	
Fax:		Fax:	
Email:		Email:	
Address:		Address:	

PART 9 FISCAL OBL	IGATIONS			
26. Determine the relative benef boxes under the beneficiary as f		ring organization based on the	Assignment Purposes listed below.	Place a number in the
-2- Principal Purpose(s)	-1- Lesser Purpose(s)	-0- Not Applicable		
PRINCIPAL PURPOSES OF TH	IE ASSIGNMENT		FEDERAL (A)	NON-FEDERAL (B)
Developmental Opportunity	for Assignee (benefits sendin	g co-sponsor)		
Supports Agency Mission (b	penefits sending co-sponsor)			
Supports Government-wide	Initiatives (benefits Federal c	o-sponsor)		
Strengthens Intergovernmen	ntal Relations (benefits both)			
Meets Temporary Need for	Skilled Personnel (benefits re	ceiving co-sponsor)		
Share Scarce Expertise (be	nefits receiving co-sponsor)			
Assists in the Transfer of ne	w Ideas and Technology (ber	nefits receiving co-sponsor)		
Other (Please specify)				
		то	TALS	

COMPUTE BENEFIT RATIO

On the basis of 100% determine what percentage of the benefits from the assignment will be received by each co-sponsoring organization (e.g., Federal 40%/Non-Federal 60%):

1. Add (A) to (B) = (C)

2. Divide (A) by (C) =	% Benefit to Federal
3. Divide (B) by (C) =	% Benefit to Non-Federal

27A. Cost-Sharing of Salary and Allowable Expenses (At rates of first day of assignment/extension)	Total Costs	Federal Share	Total Non-Federal Share	Ratio
*Annual Salary (or monthly salary annualized)	\$	\$	\$	1
*Annual Employee Benefit Costs (retirement, etc.)	\$	\$	\$	/
Total Annualized Salary & Benefit Costs	\$	\$	\$	/
**Length of Assignment Multiplier		Х		
Salary and Benefit Cost over Assignment Period	\$	\$	\$	1
***Federally Authorized Relocation Expenses	\$	\$	\$	/
Pre-Assignment Calculation of Assignments Cost	\$	\$	\$	/

* Salary and benefit cost are arbitrarily those as of the first day of the proposed assignment or extension (adjustments for changes in pay and benefits during assignment are recorded in Block 24).

** Examples: 2 year would be: **X 2** 8 months would be: **X .67** 1 full year would be: **X 1**

27B. Determination of Need for Variance Approval

*** Return trip costs at end of assignment are arbitrarily those of initial relocation unless a different method of return is planned (exclude expected job related travel expenses during assignment period which assignee will bill to gaining co-sponsor in the same manner as other employees of the gaining co-sponsor)

27D. Frequency and Method by which co-sponsors will bill and pay costs to be shared.

PART 10 CONFLICTS OF INTEREST AND EMPLOYEE CONDUCT

28. Applicable Federal, State or local conflict of interest laws have been reviewed with the employee to assure that conflict of interest situations do not inadvertently arise during this assignment.

29. The employee has been notified of laws, rules and regulations, and policies on employee conduct which apply to him/her while on this assignment.

A non-Federal employee on assignment to a Federal agency, whether by appointment or on detail, is subject to a number of provisions of law governing the ethical and other conduct of Federal employees. Title 18, United States Code, prohibits certain kinds of activity:

- receiving compensation from outside sources for matters affecting the Government (section 203),
- acting as agent or attorney for anyone in matters affecting the Government (section 205),
- acting or participating in any matter in which he or she, the immediate family, partner; or, the organization with which he
 - or she is connected has a financial interest (section 208),
- receiving salaries or contributions from other than Government sources for his or her Government services (section 209),
- soliciting political contributions (sections 602 and 603),
- intimidating to secure political contributions (section 606),
- failing to account for public money (section 643),
- converting property of another (section 654),
- disclosing confidential information (section 1905); and,
- lobbying with appropriated funds (section 1913).

Non-Federal employees are also subject to the Ethics in Government Act of 1978; 5 CFR part 735 which regulates employee responsibilities and conduct; as well as agency standards of conduct regulations. The Intergovernmental Personnel Act does not exempt a Federal employee, whether on detail or on leave without pay, from Federal conflict-of-interest statutes when assigned to a non-Federal organization. The Federal employee may not act as an agent or attorney on behalf of the non-Federal entity before a Federal agency or a court in connection with any proceeding, application, or other matter in which the Federal Government is a party or has a direct and substantial interest. The Federal agency should be particularly alert to any possible conflict-of-interest, or the appearance thereof, which may be inherent in the assignment of one of its employees. Conflict-of-interest rules should be reviewed with the employee to assure that potential conflict-of-interest situations do not inadvertently arise during an assignment.

Under the terms of the *Indian Self-Determination and Educational Assistance Act*, Federal employees on assignment to an Indian tribal government are exempt from conflict-of-interest provisions concerning representational activities, provided the employee meets notification requirements. Federal employees may act as agents or attorneys for, or appear on behalf of, such tribes in connection with any matter pending before any department, agency, court, or commission, including any matter in which the United States is a party or has a direct and substantial interest. The Federal assignee must advise, in writing, the head of the department, agency, court, or commission with which he or she is dealing or appearing on behalf of the tribal government, of any personal and substantial involvement he or she may have had as an officer or employee of the United States in connection with the matter involved.

Non-Federal employees on assignment to the Federal Government are subject to the provisions of 5 USC chapter 73, United States Code (Suitability, Security, and Conduct, including restrictions on political activity), and any applicable non-Federal prohibitions.

PART 11 OPTIONS

30. Federal Benefit Options	Required	Elected	Declined	N/A
Federal Employees Group Life Insurance (FEGLI)				
Basic Coverage				
Option A				
Option B x1 x2 x3 x4 x5				
Option C x1 x2 x3 x4 x5				
Federal Civil Service Retirement System	\$	\$	\$	\$
Thrift Savings Plan	\$	\$	\$	\$
Federal Withholding for Medicare Only (Federal employees)	\$	\$	\$	\$
Payroll Withholding for (all) Social Security Programs	\$	\$	\$	\$
Federal Employee Health Benefits	\$	\$	\$	\$
Column TOTALs				
Federal Government Employer Costs				
	L	-	I	J

TOTAL to be carried to Block 27-A, line 2, first column

TOTAL (to be carried to Block 27A, line 2, first column) \$

32. Other Benefits (indicate any other employee benefits to be made part of this agreement)

Part 12 Travel and Transportation Expenses and Allowances

33A. Indicate (1) whether Federal or non-Federal agency will pay travel and transportation expenses to, from, and during the assignment and (2) which travel and relocation expenses will be provided.

33B. Other travel, transportation meeting or conference attendance costs, etc., for which assignee will be supported or reimbursed and which co-sponsor will reimburse or support during period of assignment (guaranteed to assignee but NOT cost-shared by cosponsors).

Part 13 Applicability of Rules, Regulations, and Policies

34. Initial Appropriate Items:

A. I will observe the rules and policies governing the internal operation and management of the agency to which I am assigned

B. I have been informed that my assignment may be terminated at any time at the option of the Federal or non-Federal agency.

C. I have been informed that any travel and transportation expenses (per diem at the assignment or relocation expenses) covered from Federal agency appropriations may be recoverable as a debt due the United States if I do not serve until the completion of my assignment (unless terminated earlier by either employer) or one year, whichever is shorter.

D. I have been informed of applicable provisions should my position with my permanent employer become subject to a reduction-in-force procedure.

E.I agree to return to Federal service upon the completion of my assignment for a period equal to that of my assignment. Should I fail to serve the required time, I have been informed that I will be liable to the United States for all expenses (except salary and benefits) of my assignment. (For Federal employees only)

F. I understand, as a non-Federal employee assigned to a Federal agency, that I may return to my non-Federal position occupied prior to my assignment or to one of comparable pay, duties, and seniority and that my employee rights and benefits are fully protected. (For Non-Federal employees only)

35. In signing this agreement, I certify that I understand and will comply with the requirements and the terms of this agreement and agree to the rules, regulations, and policies applicable.

Signature of Assignee

Printed Name

Part 15 Certification of Approving Officials

- In signing this agreement, we certify that:
 - the description of duties and responsibilities is current and fully and accurately describes those of the assigned employee;
 - this assignment is being entered into to serve a sound, mutual public purpose and not solely for the employee's benefit;
 - at the completion of the assignment, the participating employee will be returned to the position he/she occupied at the time this agreement was entered into or a position of like seniority, status and pay.

36. Component Supervisor

I further certify that I understand and will comply with the requirement of Federal supervisors both during the assignment period and during the post-assignment evaluation period.

Signature of Component Supervisor

Printed Name

37. Component of Component Deputy Commissioner

I endorse all terms provided in this agreement. If a non-Federal employee is to be assigned to a Federal position, I certify that this assignee's skills are not available among former employees registered on a Reemployment Priority List for the commuting area of the assignment (this applies if SSA undergoes a RIF).

Signature of Component Deputy Commissioner

Printed Name

Page 8

Date

Date

Date

38. Certification of Authorizing Non-Federal Official Resources		39. Certification of Deputy Commissioner for Human Resources
In signing this agreement we certify that the description of dut	ies is current and fu	
that this assignment is being entered into (or extended) for a s	sound, mutually ben employee will be re	eficial, public purpose and not solely for the employee's benefit, eturned to the position occupied at the time this agreement was entered
Signature of Authorizing Non-Federal Official		Signature of Deputy Commissioner for Human Resources
		Signature of Deputy Commissioner for Human Resources
Printed Name		Printed Name
Date		Date
40	. Certification of Co	nmissioner of SSA
Signature		Date
Printed Name		
	Privacy A	Act Statement
We will use the information you provide to formally document higher education, Indian tribal government, or other eligible or	9397, as amended, a and record your ten ganization. We ma	authorize us to collect this information, including your Social Security number. nporary assignment to or from a State or local government, institution of y also use the information as the legal basis for personnel and financial or employers, educational institutions, or law enforcement agencies, or by
the Intergovernmental Assignment Program.	vised	or part of the information may result in your being ineligible for participation in
We rarely use the information you supply for any p government, institution of higher education, Indian or to another agency in accordance with approved routine use	nent below.	and record your temporary assignment to or from a State or local ible organization. However, we may disclose information to another person t are not limited to the following:
requested n connection with appeals, special studie	es of the civil service	ction Board (MSPB), or the Office of the Special Counsel when information is e and other merit systems, review of those adencies' rules and regulations, for such other function of these agencies as may be authorized by law, e.g.,
 To comply with Federal laws requiring the releand Department of Veterans' Affairs). 	ase of information fi	rom Social Security records (e.g., to the Government Accountability Office
		Records Administration (NARA) under 44 U.S.C. §§ 2904 and 2906, as from disclosure by Federal law for the use of those agencies in conducting
4. To facilitate statistical research, audit, or inves e.g., to the Bureau of the Census and private conc		cessary to assure the integrity and improvement of Social Security programs to Social Security).
	ce 60-0239, entitled	f Personnel Management's System of Records Notice OPM/GOVT-1, entitled Personnel Records in Operating Offices. Our notices and additional at any of our local personnel offices.

Paperwork Reduction Act Statement - This information collection meets the requirements of 44 U.S.C. § 3507, as amended by section 2 of the <u>Paperwork Reduction Act of 1995</u>. You do not need to answer these questions unless we display a valid Office of Management and Budget control number. We estimate that it will take about 30 minutes to read the instructions, gather the facts, and answer the questions. **SEND OR BRING THE COMPLETED FORM TO YOUR LOCAL SOCIAL SECURITY OFFICE. You can find your local Social Security office through SSA's website at <u>www.socialsecurity.gov</u>. Offices are also listed under U. S. Government agencies in your telephone directory or you may call Social Security at 1-800-772-1213 (TTY 1-800-325-0778).** *You may send comments on our time estimate above to: SSA, 6401 Security Blvd, Baltimore, MD 21235-6401.* **Send <u>only</u>** *comments relating to our time estimate to this address, not the completed form.*

EXTENSION REQUEST

EXTENSION OF ASSIGNMENT AGREEMENT UNDER THE INTERGOVERNMENTAL PERSONNEL ACT

SSA Modification (10/08)

(Numbered Items match Initial Agreement Information Blocks)

- 2. Assignee's Name
- 3. Social Security Number
- 6. Federal Agency Co-Sponsor (SSA/DC/Office/Component)
- 7. Non-Federal Agency Cosponsor:

20A. Previously Approved Assignment Period: From	To:
20B. Proposed Period for Extension: From	To:

20C. Reason for Extension

27A. Cost-Sharing of Salary and Allowable Expenses (At rates of first day of assignment/extension)	Total Costs	Federal Share	Total Non-Federal Share	Ratio
*Annual Salary (or monthly salary annualized)	\$	\$	\$	/
*Annual Employee Benefit Costs (retirement, etc.)	\$	\$	\$	/
Total Annualized Salary & Benefit Costs	\$	\$	\$	/
**Length of Assignment Multiplier		Х		
Salary and Benefit Cost over Assignment Period	\$	\$	\$	/
***Federally Authorized Relocation Expenses	\$	\$	\$	/
Pre-Assignment Calculation of Assignments Cost	\$	\$	\$	/

*Salary and benefit costs are arbitrarily those as of the first day of the proposed assignment or extension (adjustments for changes in pay and benefits during the extension period are recorded in Block 24 of the initial agreement unless modified in Item #32B)

**Example: 2 year would be: X 2 8 months would be: X .67 1 full year would be: X 1

***Return trip costs at the end of assignment are arbitrarily those of initial relocation unless a different method of return is planned (exclude expected jobrelated travel expenses during assignment period for which assignee will bill to gaining co-sponsor in the same manner as other employees of the gaining cosponsor).

	Federal	Non-Federal
Benefit Ratio (Last line from Block 26 of initial agreement)		1
Cost-Sharing Commitments (last line from Block 27A above)		/
Federal costs are the same or less than estimated Federal benefit (go to Ite	em #32)	
Federal costs exceed estimated Federal benefit		
Variance approval not required as explained in Block 27B of Initial agreeme	ent	
Justification for variance explained in Block 27B of Initial agreement		
Other justification:		
27D. Frequency and method by which co-sponsors will bill and pay shared cost	ts.	

32. All other terms of the previously approved agreement remain the same except as noted below:

CERTIFICATION AND CONCURRENCE: The mutual benefits described in the initial agreement for both the Federal and non-Federal co-sponsors are expected to continue through this extension period:

35. Signature of Assignee	Date
Printed Name	
36. Signature of Component Supervisor	Date
Printed Name	
37. Signature of Component	Date
Printed Name	
38. Signature of Non-Federal Official	Date
Printed Name	
39. Signature of Deputy Commissioner Human Resources	Date
Printed Name	
40. Signature of Commissioner, SSA	Date

Printed Name

The following pages contain checklists that are to remain with this agreement.

Obligated Service Agreement



Obligated Service Agreement

IPA Assignee Name:

Date of Assignment:

IPA Assignee, please initial the appropriate statement below.

I agree, as an SSA employee on IPA assignment, to return to Federal service for a period equal to the length of my assignment. If I fail to carry out this agreement, I will reimburse SSA for its share of the assignment costs (exclusive of salary and benefits).

I agree to the above statement (SSA employee)

I am not an SSA employee.

IPA Assignee, please initial the item below and sign and date this agreement.

Any travel and transportation expenses (per diem at the assignment location or limited relocation expenses), except travel expenses paid for traveling away from the assignment location, that were covered by SSA funds will be recoverable as a debt due the United States if I fail to serve through the completion of my assignment, unless terminated earlier by either employer or 1 year whichever is shorter, or unless SSA waives the debt.

I agree to the above statement

Employee Signature

Date

Printed Name

Checklist for Incoming Assignments

NAME OF POTENTIAL INTERGOVERNMENTAL PERSONNEL ACT (IPA) ASSIGNEE:

NAME OF SSA COMPONENT PROVIDING THE POTENTIAL IPA ASSIGNMENT:

Please check appropriate box and provide explanation. If you need additional space, please insert another page and reference the numbered question.

Question	Yes	No	Explanation
1. Has the employee been a permanent career employee of the non-Federal organization for at least 90 days? If no, employee cannot be selected for an IPA assignment.			
2. Does the employee possess skills and expertise not available in the Federal workforce? If no, please explain.			
3. Can the proposed task be accomplished by contract or consultant? If no, please explain.			
4. Has employee been given SSA Standards of Conduct information?			
5. Are sufficient funds available for this assignment?			
6. Is SSA paying more than 50% of the total cost- sharing? If yes, has a justification been included with the IPA Agreement?			
7. Is the employee aware he/she will be required to repay SSA for travel and transportation expenses that were paid in connection with the assignment if he/she fails to complete the required period (unless the assignment is terminated earlier by either organization)?			
8. Is the employee aware he/she must return to the non- Federal organization upon completion of the assignment?			
9. Has the individual participated in this program for 4 continuous years? If yes, there must be a 12-month return to duty with their originating organization.			
10. For documentation purposes, attach a resume to this agreement.			

We have reviewed the information indicated above along with the attached IPA Assignment Agreement and recommend approval of this assignment.

Component Associate Commissioner's Signature		Date	
Printed Name			
Component Deputy Commissioner's Signature		Date	
Printed Name			
PLEASE RETURN THIS FORM TO:	Office of the Deputy Commissioner for He Resources/Executive and Special Service Room 2510 Annex Building, 6401 Security Boulevard		

Baltimore, Maryland 21235-6401

ATTN: IPA Staff