202~~4~~5 Annuity Supplement Earnings Report

OMB Approval 3206-0194

U.S. Office of Personnel Management
Retirement Surveys & Students Branch
1900 E Street, NW
Washington, DC 20415-0001

Claim Number	***DOB***
Date	**Case Name**

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Complete and return this form if your allowable earnings were more than $~~22,320~~ $23,400 or if your FERS Annuity Supplement was reduced in a previous year. ***If you answered "No" to questions 1 and 2 below, please do not return this form.***

The annuity supplement part of your FERS benefit is subject to an earnings test similar to the one applied to Social Security Benefits and uses the same exempt amount, as required by law in 5 U.S.C. §8421a. Your annuity supplement will be reduced $1.00 for every $2.00 by which you exceed the exempt amount *(~~$22,320~~ for ~~2024~~)*. $23,400 for 2025 By law, this reduction is effective July 1, 202~~5~~6. We apply the test only to earnings you received in ~~2024~~ 2025 ***after retirement*** and after you reach the Minimum Retirement Age (MRA). Certain reemployed Air Traffic Controllers (ATC) are also exempt from this earnings test. The exempt amount for ~~2025 is $23,400~~ 2026 is $24,480.

Please answer the following questions and return this report form no later than June 30, 202~~5~~6.

1. Is your annuity supplement currently reduced because you reported excess gross work earnings in a previous year?
   - ◯ Yes *(Please skip directly to question 4 and report your gross work earnings for 202~~4~~5.)*
   - ◯ No *(Please continue to question 2.)*
2. Were your earnings more than $~~22,320~~ $23,400 in 202~~4~~5 ***after retirement? Note:*** See ATC exemption on the back of the report form.
   - ◯ Yes *(Please continue to question 3.)*
   - ◯ No ***(Do Not Return This Form.)***
3. Refer to the chart below to find out what you should report based on your year of birth.

Year of Birth	What You Should Report
~~1963 – 1967~~ 1964-1968	Report all ~~2024~~ 2025 gross work earnings ***after retirement*** and ***after you turned 56 years and ~~6~~ 8 months***, if your earnings were more than $~~22,320~~. $23,400
~~1968~~ 1969	Report all ~~2024~~ 2025 gross work earnings ***after retirement*** and ***after you turned 56 years and ~~8~~ 10 months***, if your earnings were more than ~~$22,320~~ $23,400. *(If under ~~$22,320~~ $23,400,* ***Do Not*** *Return This Form.)*

4. What were your ***gross work earnings*** in 202~~4~~5 ***after retirement***? ***Note:*** See ATC exemption on the back of the report form.

   ______ . __ (*Dollars* . *Cents*)

Warning: Your earnings for 202~~4~~5 will be verified through a computer match with the Social Security Administration's earning file. Any intentionally false statement or willful misrepresentation is punishable by fine, imprisonment, or both (18 U.S.C. 1001).

Signature	Date *(mm/dd/yyyy)*

Daytime telephone number	Email address

Instructions:

1. Read the section below entitled: How To Determine The Amount of Earnings You Should Report. If you have questions, please telephone 1-888-767-6738 Monday through Friday between 7:40 AM and 5:00 PM, Eastern Time. Hearing impaired users should utilize the Federal Relay Service by dialing 711 or their local communications provider to reach a Communications Assistant.
2. Provide clear and legible information. Do not detach any portion of this form.
3. Fill in, sign, and mail this report in the envelope provided, or mail the report to: U.S. Office of Personnel Management, Retirement Surveys and Students Branch, FERS Annuity Supplement Survey, 1900 E St., NW, Room 2416, Washington, DC 20415-0001 or fax your response to (202) 606-0022.
4. Retain copies of evidence supporting your claimed earnings in the event you are required to furnish documentation of earnings.
5. ***Do Not*** include your annuity payments from OPM ***or any ATC earnings as described in the next section***. Include, as earnings, all income from wages and self-employment that you actually received plus ***deferred*** income you actually earned during 2024. 5

How To Determine The Amount of Earnings You Should Report

Include as earnings:

- All gross wages from employment covered by Social Security.
- All cash pay for agricultural work, domestic work in a private home, service not in the course of your employer's trade or business.
- All pay, cash or non-cash, for work as a home worker for a non-profit organization, no matter the amount. *(The Social Security $100.00 tax test does not apply.)*
- All pay for work not covered by Social Security, if the work is done in the United States, including pay for:
  * Family employment,
  * Work as a student, student nurse, intern, newspaper and magazine vendor,
  * Work for States or foreign governments or instrumentalities, and
  * Work covered by the Railroad Retirement Act.

Regardless of what income is called or who receives it, if it is actually wages for services you performed or net earnings from self-employment you secured, it must be included in applying the earnings test.

Do not include as earnings:

- Post retirement earnings of a retired air traffic controller who is employed as an air traffic control instructor, or supervisor thereof, or as an air traffic controller under contract with the Federal Aviation Administration, including an instructor or supervisor working at an on-site facility *(such as an airport)*. See 5 U.S.C. §8421a(c).
- Any income paid as retirement income, including your FERS benefit or any benefits received as a survivor.
- Monies which you earned before entitlement for annuity supplement and/or received for annual leave upon retirement. This includes separation incentives.
- Unemployment compensation.
- Gifts, insurance proceeds, inheritances, scholarships, alimony, capital gains, net business losses, prize winnings.
- Payments-in-kind for domestic service in the employer's private home, for agricultural labor, for work not in the course of the employer's trade or business, or the value of meals and lodging.
- Rentals from real estate which cannot be counted in earnings from self-employment because, for instance, you were not a real estate dealer.
- Interest and dividends not resulting from trade or business.
- Pay for Veteran's training and for jury duty.
- Payments by an employer which are reimbursement specifically for your travel expenses and which are so identified by the employer at the time of payment and/or reimbursement or allowance for moving expenses, if they are not counted as wages for Social Security purposes.

For more information about the Annuity Supplement, refer to Information for FERS Annuitants, RI 90-8. Information begins in Part B. If you would like a copy of this booklet, call the Retirement Information Office toll free at 1-888-767-6738; hearing impaired users should utilize the Federal Relay Service by dialing 711 or their local communications provider to reach a Communications Assistant; or write: U.S. Office of Personnel Management, Post Office Box 45, Boyers, Pennsylvania 16017. This booklet is also available on the OPM website at *www.opm.gov/retirement-services/publications-forms/pamphlets/RI90-8.pdf*. Remember your annuity supplement will stop at the end of the month you reach age 62 or the month before you become entitled to social security benefits, whichever is earlier.

Privacy Act Statement

Authority: OPM collects this information under 5 U.S.C. Chapter 84, including 5 U.S.C. § 8421 and 5 CFR 842.504. **Purpose**: OPM uses this information to determine whether you remain eligible for the annuity supplement and, if so, the amount of the supplement. **Routine Uses**: The information you provide may be disclosed as a routine use to the applicable published system of records notice, OPM/CENTRAL-1 Civil Service Retirement and Insurance Records. Routine uses include disclosures to Federal, State, local, Tribal, and other authorized entities when necessary to administer retirement and insurance benefits, comply with applicable laws, or carry out other published routine uses. A complete list of the routine uses is available at www.opm.gov/privacy. **Effects of Not Providing the Requested Information**: Providing this information is voluntary. However, if you do not provide the requested information, or if you provide inaccurate information, OPM may be unable to determine whether you remain eligible for the annuity supplement. As a result, your annuity supplement payments may be suspended or adjusted.

Public Burden Statement

The public reporting burden to complete this information collection is estimated at 15 minutes per response, including time for reviewing instruction, searching data sources, gathering and maintaining the data needed, completing and reviewing the collected information. An agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a currently valid OMB control number. Send comments regarding this burden estimate or any other aspect of this information collection, including suggestions for reducing this burden to the Office of Personnel Management, RS Publications Team at *RSPublicationsTeam@opm.gov*. Current information regarding this collection of information - including all background materials - can be found at *https:/www.reginfo.gov/public/do/PRAMain* by using the search function to enter either ***2024 Annuity Earnings Supplement Report*** or ***3206-0194***.