

Federal Benefits Inventory

There may be several Federal benefits available to you. Below is a summary of those benefits along with telephone numbers and websites for future reference:

Name: _____

Other Names Used: _____

Date of Birth: _____ Place of Birth: _____

Social Security Number: _____

CSRS and FERS Basic Benefits

Civil Service Annuitant (CSA) Number: _____
(OPM will assign you this claim number after you retire)

Services Online PIN: _____
(OPM will send this PIN to you after you retire)

<https://www.servicesonline.opm.gov/>

Services Online provides retirement services on demand. Use it to:

- Change your Federal and State Income Tax Withholding
- Change your Mailing Address
- Change your Password
- Establish an Allotment to an Organization
- Request Duplicate Annuity Booklet
- Set up a Checking or Savings Allotment
- Sign up for Direct Deposit of your Payment
- Update your Email Address/Opt-in to Receive Information Electronically
- View/Print Annuity Statement/Verification of Income
- View/Print 1099-R Tax Forms
- View/Print Retirement Services Reference Card (ID Card)
- View/Print a Year-to-Date Summary Of Payments
- View/Print Verification of Life Insurance (FGLI)
- View the Status of your Case while in Interim Pay

Services Online cannot be used to make any changes to your Federal dental or Federal vision insurance (FEDVIP) coverage. Please contact [BENEFEDS](#) or call 1-877-888-3337 for any changes and/or comments related to your FEDVIP coverage.

Office of Personnel Management (OPM)

1-888-767-6738 or TTY 1-800-878-5707

Email address: retire@opm.gov

(202) 606-1800 or TTY (202) 606-2532

<https://www.opm.gov/retirement-services/>

OPM becomes your “servicing personnel office” at retirement. You will need to contact OPM to change your health benefits, tax withholdings, address, direct deposit, allotments, etc. OPM is your servicing office for information on your annuity, starting the survivor annuity, applying for FEGLI etc.

When a survivor applies for benefits, OPM may need the following documents: marriage certificate; children’s birth certificate; court papers appointing executor/administration, guardian or other fiduciary; DD 214 or other military discharge certificates; court orders regarding divorce.

Location of documents listed above: _____

Location of CSRS/FERS Designation of Beneficiary form: _____

Thrift Savings Plan (TSP)

1-877-968-3778 or 1-877-847-4385 TDD

www.tsp.gov

TSP Account Number _____ TSP PIN _____

Thrift Savings Plan Balance: \$ _____

Outstanding TSP Loan: \$ _____

TSP Annuity: \$ _____ Monthly Payment: \$ _____

Location of TSP Designation of Beneficiary form: _____

Social Security Administration

1-800-772-1213 or 1-800-325-0778 TTY

www.ssa.gov

The Social Security Administration is the source of information regarding your social security benefits eligibility based on your own work or spouse’s work, benefit computation and possible reductions, etc.

Medicare

1-800-772-1213 or 1-800-325-0778

www.medicare.gov

You paid Medicare Part A (Hospital) tax while employed. Most people will be eligible for Medicare beginning at age 65. You need to contact the Social Security Administration to begin the benefit. You may also want to obtain Part B of Medicare to help with other eligible health care expenses.

Federal Health Employee Benefits (FEHB) <https://www.opm.gov/healthcare-insurance/>

FEHB Carrier: _____ Enrollment ID Number: _____

Names of Insured: _____

Telephone number of carrier: _____

Information and pamphlets regarding FEHB and Medicare: www.opm.gov/insure/health/medicare/

Federal Employees Dental Benefits www.benefeds.com

1- 877-888-3337 or 1-877-889-5680 TTY <https://www.opm.gov/healthcare-insurance/>

Dental Carrier: _____ Enrollment ID Number: _____

Names of Insured: _____

Telephone number of carrier: _____

Federal Employees Vision Benefits www.benefeds.com

1- 877-888-3337 or 1-877-889-5680 TTY <https://www.opm.gov/healthcare-insurance/>

Vision Carrier: _____ Enrollment ID Number: _____

Names of Insured: _____

Telephone number of carrier: _____

Flexible Spending Account (FSA) www.fsafeds.com

1-877-372-3337 or 1-800-952-0450 TTY email: FSAFEDS@wageworks.com
(after 09/01/2016)

You may have two separate FSAs: one for Dependent Care and the other for Health Care. This benefit is currently only available to active employees. You will no longer be eligible once you retire:

Dependent Care FSA: _____

Health Care FSA: _____

Federal Employees Group Life Insurance (FEGLI)

<https://www.opm.gov/healthcare-insurance/life-insurance/>

FEGLI Coverage: _____

Name of Insured: _____

Names of Insured Spouse and/or Eligible Child(ren) if you have family coverage: _____

Telephone number of carrier: 1-888-767-6738 (Annuitants please contact OPM not FEGLI)*

*If you are currently an active employee, please contact your Benefits Specialist. You can find contact information at <https://www2.usgs.gov/humancapital/hr/askhro.html>.

Location of Designation of Beneficiary form: _____

Federal Long Term Care Insurance (LTC)

www.ltcfeds.com

1-800-582-3337 or 1-800-843-3557 TTY

Long Term Care plan: _____ Policy Number: _____

Location of Policy Info: _____

Veterans Administration

1-800-827-1000 or 1-800-829-4833

www.va.gov

The VA is the source of information for such benefits as compensation, burial expenses etc. Your DD 214 discharge papers may be necessary to claim the benefits.

Location of current compensation information: _____

Location of DD 214: _____

Savings Bonds

www.treasurydirect.gov/

1-844-284-2676

Web Email: <https://www.treasurydirect.gov/WF/WebFeedback?site=td01&subject=eeori>

Location of savings bonds: _____

Location of designation of beneficiary information: _____