

Seq.	Function	Sub-Function	Category	Plan	Requirement Description	Index
1	Benefits Calculations	Claims Management	Claiming Benefits - How Retirement Benefits are Paid	Both POLFF and Teachers	When a member retires, he or she will receive retirement benefits in monthly installments during his or her lifetime.	2692
2	Benefits Calculations	Claims Management	Claiming Benefits - How Retirement Benefits are Paid	Both POLFF and Teachers	Benefits are payable on the first business day of the first month after entitlement to the retirement benefit begins.	2693
3	Benefits Calculations	Claims Management	Claiming Benefits - How Retirement Benefits are Paid	Both POLFF and Teachers	A retired member who first becomes entitled to a retirement annuity on or after February 15, 1980, who is receiving a retirement annuity under the plan, and who subsequently becomes employed by the government of the District of Columbia will have his or her employment salary reduced by the amount necessary to ensure that the sum of the retirement annuity and the compensation for employment equal the salary otherwise payable for the position currently held by the retired member.	2694
4	Benefits Calculations	Claims Management	Claiming Benefits - How Retirement Benefits are Paid	Both POLFF and Teachers	If: (1) a member dies prior to retirement without a survivor entitled to receive an annuity; or	2695
5	Benefits Calculations	Claims Management	Claiming Benefits - How Retirement Benefits are Paid	POLFF	(d) Special Rule Regarding Certain Death Benefits.-- (1) In general.--In the case of a benefit payment to which an individual is entitled under a District Retirement Program which is payable on the death of a covered District employee or former covered District employee and which is not determined by the length of service of the employee or former employee, the Federal benefit payment determined with respect to the individual shall be equal to the pre-freeze date percentage of the amount otherwise payable.	2697
6	Benefits Calculations	Claims Management	Claiming Benefits - How Retirement Benefits are Paid	POLFF	(d) Special Rule Regarding Certain Death Benefits.-- (2) Pre-freeze date percentage defined.--In paragraph (1), the "pre-freeze date percentage" with respect to a covered District employee or former covered District employee is the amount (expressed as a percentage) equal to the quotient of-- (A) the number of months of the covered District employee's or former covered District employee's service prior to the freeze date; divided by (B) the total number of months of the covered District employee's or former covered District employee's service.	2698
7	Benefits Calculations	Claims Management	Claiming Benefits - How Retirement Benefits are Paid	Both POLFF and Teachers	If a person was, at the time of his or her death, receiving or was entitled to receive an annuity, all unpaid annuity due the person at the time of death is paid in the following order of precedence: - First, to the widow or widower of such person; - if there is no such person, then to the children of the member, and descendants of deceased children by representation; - if there is no such person, then to the parents of the member or the survivor of them; - if there is no such person, then to the duly appointed legal representative of the estate of the member; - if there is no such person, to the person entitled to act in such capacity under the laws of the member's domicile Payment under these provisions bar recovery by any other person.	2699

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8	Benefits Calculations	Claims Management	Counting Years of Service	Both POLFF and Teachers	Accrued and unused sick and/or annual leave may not be used to meet the service requirements for eligibility to retire.	2722
9	Benefits Calculations	Claims Management	Counting Years of Service	Both POLFF and Teachers	If the data on unused sick leave is needed to respond to an inquiry, District officials must have access to the data in the same units as the sick leave accrued.	2723
10	Benefits Calculations	Disability Claims	Example Of Disability Benefit Calc 2of2	Teachers	<p>Next, the basic annual benefit must be compared to the minimum benefit permitted. The minimum benefit is the lesser of:</p> <ul style="list-style-type: none"> - 40% of average salary. Here, average salary is \$55,000, 40% of which is \$22,000, or - the benefit received using an average salary of \$55,000 with service projected to age 60, or \$34,237.50 (\$4,125 + \$4,812.50 + \$25,300) (2% of average salary times 23 years)). <p>Here the lesser is 40% of average salary, and this amount is greater than the annual actual basic benefit, so the annual benefit is \$22,000 and monthly payments would equal \$22,000/12 months, or \$1,833.00 per month.</p>	1325
11	Benefits Calculations	Disability Claims	Example Of Disability Benefit Calc	Teachers	A teacher who becomes disabled before acquiring five years of eligible service will not receive a pension.	1326
12	Benefits Calculations	Disability Claims	Example Of Disability Benefit Calc	Teachers	However, the teacher will receive a lump sum refund for mandatory and voluntary plan contributions.	1327
13	Benefits Calculations	Disability Claims	Eligibility for Retirement - Disability Retirement	Teachers	Pension payments will cease on the date the DCPS HR reappoints the teacher to the position. If the teacher refuses to accept the position, no annuity can be paid after the date of refusal.	1597
14	Benefits Calculations	Disability Claims	Disability Retirement	POLFF	The retirement plan pays two kinds of disability benefits: one for service related disabilities and one for disabilities that are not service-related.	2621
15	Benefits Calculations	Disability Claims	Disability Retirement	POLFF	A member can retire because of a service related disability and receive a retirement annuity from the plan.	2622
16	Benefits Calculations	Disability Claims	Disability Retirement	POLFF	The disability must be the result of an illness or injury received in the performance of duty, or from an illness or injury aggravated in the performance of duty.	2623
17	Benefits Calculations	Disability Claims	Disability Retirement	POLFF	To qualify for disability retirement, the member must be "unable to perform the full range of duties," defined as "the ability of the member to perform all of the essential functions of police work or fire suppression as determined by the established policies and procedures of the Metropolitan Police Department or the Fire and Emergency Medical Services Department, and to meet the physical examination and physical agility standards established under the Police and Fire Minimum Standards Amendment Act of 2004.	2624

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18	Benefits Calculations	Disability Claims	Disability Retirement	POLFF	The benefit will be paid upon retirement and will continue until the death of the member, recovery from the disability prior to reaching age 50, or the restoration of the member to an earning capacity fairly comparable to the current rate of compensation of the position occupied by the member at the time of retirement.	2626
19	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	If a member was hired before February 15, 1980, he or she can retire on the recommendation of the Police and Fire Clinic and the concurrence of the Retirement and Relief Board (RRB). If disability retirement is approved, and the member is subsequently employed, the member must notify the RRB and DCRB of the employment.	2627
20	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	A member retired for disability must also undergo, at least once every 12 months, a medical examination of the disability, except that a member who undergoes an examination because of subsequent employment cannot be required to submit to an examination for another 12 months.	2628
21	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	A medical examination cannot be ordered after the retired member reaches age 50.	2629
22	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	If a member was hired before February 15, 1980, the disability retirement benefit will be based on the average pay and total service accrued at the time of retirement. Average pay is the highest annual rate resulting from averaging the member's basic salary as a D.C. police officer or firefighter for 12 consecutive months, with each rate weighted by the time it was in effect. The retirement benefit is calculated at a rate of 2.5% of average pay for each year of service, but shall not exceed 70% of average pay or be less than 66 2/3% of average pay.	2630
23	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	If a member was hired on or after February 15, 1980, he or she can retire following evaluation by the Board of the Police and Fire Clinic and with the approval of the Police and Firemen's Retirement and Relief Board.	2631
24	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	In addition, the Police and Fire Clinic must determine the percentage of the impairment and resulting disability and must report this to the Police and Firemen's Retirement and Relief Board.	2632
25	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	The percentage of the impairment or disability may be re-determined at any time before the member reaches age 50.	2633

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26	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	For members hired on or after February 15, 1980, the disability benefit will be calculated based on the member's basic salary at the time of retirement, and the percentage of disability as determined by the Retirement and Relief Board.	2634
27	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	The formula is: 70% of basic salary times the percentage of disability.	2635
28	Benefits Calculations	Disability Claims	Disability Retirement - FOR MEMBERS HIRED BEFORE FEBRUARY 15, 1980	POLFF	The minimum benefit is 40% of basic salary.	2636
29	Benefits Calculations	Disability Claims	Disability Retirement - AGGRAVATION OF DISEASE OR INJURY	POLFF	A member may retire and receive a retirement annuity based on the aggravation of a disease only if the disease was reported to the Police and Fire Clinic within 30 days after it was first diagnosed.	2637
30	Benefits Calculations	Disability Claims	Disability Retirement - AGGRAVATION OF DISEASE OR INJURY	POLFF	In the case of an injury aggravated in the performance of duty, the injury must have been reported to the Board within seven days after the injury was incurred, or seven days after the member was physically able to report it.	2638
31	Benefits Calculations	Disability Claims	Disability Retirement - AGGRAVATION OF DISEASE OR INJURY	POLFF	These reports must include medical proof of the condition.	2639
32	Benefits Calculations	Disability Claims	Disability Retirement - AGGRAVATION OF DISEASE OR INJURY	POLFF	A member who retires based upon service-related aggravation of a disease or injury receives the same benefits as a member who retires from an injury sustained or a disease contracted in the performance of duty.	2640
33	Benefits Calculations	Disability Claims	Disability Retirement - NON-SERVICE RELATED DISABILITIES	POLFF	If a member is disabled by a non-service related injury incurred or disease contracted before reaching eligibility for retirement, he or she may qualify for a disability retirement annuity.	2641

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34	Benefits Calculations	Disability Claims	Disability Retirement - NON-SERVICE RELATED DISABILITIES	POLFF	To be eligible: - The member must have five or more years of police or fire service when he or she becomes disabled, and - The member must be "unable to perform the full range of duties," defined as "the ability ... to perform all of the essential functions of police work or fire suppression as determined by the established policies and procedures of the Metropolitan Police Department or the Fire and Emergency Medical Services Department,	2642
35	Benefits Calculations	Disability Claims	Disability Retirement - NON-SERVICE RELATED DISABILITIES	POLFF	The Retirement Relief Board decides whether a member is eligible for non-service related disability retirement.	2643
36	Benefits Calculations	Disability Claims	Disability Retirement - NON-SERVICE RELATED DISABILITIES	POLFF	If a member does not have five years of police or fire service at the time of a non-service related disability, the member will, upon approval, will be separated from the service. In such circumstances, he or she will be entitled to a lump sum refund of retirement contributions.	2644
37	Benefits Calculations	Disability Claims	Disability Retirement - For Members Hired Before February 15, 1980	POLFF	If a member is hired before February 15, 1980, the retirement annuity for a non-service related disability will be based on the average pay and total service at the time of disability, as follows: 2% of average pay times years of total service	2645
38	Benefits Calculations	Disability Claims	Disability Retirement - For Members Hired Before February 15, 1980	POLFF	The maximum retirement annuity is 70% of the member's average pay. The minimum retirement annuity is 40% of average pay.	2646
39	Benefits Calculations	Disability Claims	Disability Retirement - For Members Hired Before February 15, 1980	POLFF	Average pay is calculated in the same manner as for members hired before February 15, 1980, who retire because of a service-related disability.	2647
40	Benefits Calculations	Disability Claims	Disability Retirement - For Members Hired Before February 15, 1980	POLFF	If a member was hired on or after February 15, 1980, the retirement annuity for a non-service related disability will be based on the member's basic salary at the time of retirement and the percentage of the disability (determined in the same manner as percentage of disability for members hired on or after February 15, 1980, who retire for a service related disability), as follows: 70% of basic salary times percentage of disability The minimum benefit is 30% of the member's basic salary at the time of retirement.	2648

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41	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	Members who have income from wages and/or self-employment may have their disability annuities reduced if such income exceeds the amounts specified below. The Retirement Relief Board may require disability annuitants to submit a notarized statement containing information on income received from wages and/or self-employment.	2649
42	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	A member who has retired for a disability either incurred or not incurred in the performance of duty will have his annuity terminated if, prior to reaching age 50, he or she is restored to an earning capacity fairly comparable to the current rate of compensation of the position occupied by the member at the time of retirement.	2650
43	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	Plan payments will cease 45 days after notification to DCRB that a member's earning capacity has been restored.	2651
44	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	However, the retirement annuity may resume if the earnings from wages and self-employment fall below the 80% limit for any full year after the member is determined to be restored to an earning capacity.	2652
45	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	Members hired on or after February 15, 1980, have a different income limit for wages and self-employment. The relationship between the earnings limit and the member's retirement annuity determines whether or not the retirement will be reduced: - If earnings from wages or self-employment in a calendar year exceed the difference between 70% of the current earnings limit (the current annual salary for the position which the annuitant held immediately prior to retirement, or the current entry level salary for active members divided by .7, whichever is greater) and the member's actual retirement annuity, the annuity will be reduced by \$.50 for each \$1 of such income received during such year in excess of such difference. In addition, if earnings exceed the difference between 100% of the current earnings limit and the retirement annuity (not including the above reduction), the annuity will be further reduced by \$.20 for each \$1 of such income received during	2653
46	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	The reductions begin as soon after the end of the calendar year as practicable.	2654
47	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	The reductions are prorated in equal amounts over a period of 12 consecutive months.	2655
48	Benefits Calculations	Disability Claims	Disability Retirement - EARNINGS LIMITS ON DISABLED MEMBERS WHO RETURN TO WORK	POLFF	If the Retirement Relief Board determines that the level of income of an annuitant whose annuity would otherwise be subject to reduction has decreased significantly during the period in which the reduction would occur, the Retirement Relief Board may authorize the withholding of a lesser amount for all or part of the 12 month period. In the alternative, the Retirement Relief Board may waive reductions altogether.	2656

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49	Benefits Calculations	Disability Claims	DISABILITY BENEFITS	POLFF	If an employee separates for disability retirement after June 30, 1997, and, on the date of separation, the employee -- (a) Satisfies the age and service requirements for optional retirement, the Federal Benefit Payment commences immediately, that is, the Federal Benefit Payment is calculated as though the employee retired under optional retirement rules using only service through June 30, 1997; (See examples 7A - Req. #59 and 7B - Req. #60) or	3032
50	Benefits Calculations	Disability Claims	DISABILITY BENEFITS	POLFF	(b) Does not satisfy the age and service requirements for optional retirement, the Federal Benefit Payment begins when the disability retiree reaches deferred retirement age. (See § 29.343.)	3033
51	Benefits Calculations	Disability Claims	DISABILITY BENEFITS	POLFF	The system needs to track disability annuitants' date of normal retirement (line of duty, line of duty presumptive injury, and non-line of duty,	3034
52	Benefits Calculations	Disability Claims	DISABILITY BENEFITS	POLFF	To determine whether service is creditable for the computation of Federal Benefit Payments, the controlling factor is whether all requirements for the service to be credited under the Police and Fire Fighters Plan or the Teachers Plan were satisfied as of June 30, 1997.	3035
53	Benefits Calculations	Disability Claims	DISABILITY BENEFITS	POLFF	(a) The general rule that Federal Benefit Payments are calculated under the applicable retirement plan as though the employee were eligible for optional retirement and separated on June 30, 1997, does not apply to disability benefits prior to optional retirement age. (b) In cases involving disability benefits prior to optional retirement age, no Federal Benefit Payment is payable until the retiree reaches the age of eligibility to receive a deferred annuity (age 55 under the Police and Firefighter Plan and age 62 under the Teachers Plan). When the age for the deferred annuity is reached, the Federal Benefit Payment is paid using creditable service accrued as of June 30, 1997, and average salary (computed under the rules for the applicable plan) as of the date of separation. (See examples 6 - Reqs. #57 and 58 and 7 - Reqs. #59 and 60)	3055
54	Benefits Calculations	Disability Claims	DISABILITY BENEFITS	POLFF	(c) Special Rule Regarding Disability Benefits.--To the extent that any portion of a benefit payment to which an individual is entitled under a District Retirement Program is based on a determination of disability made by the District of Columbia Retirement Board or the Trustee after the freeze date, the Federal benefit payment determined with respect to the individual shall be an amount equal to the deferred retirement benefit or normal retirement benefit the individual would receive if the individual left service on the day before the commencement of disability retirement benefits.	3057

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55	Benefits Calculations	Disability Claims	DISABILITY RETIREMENT EXAMPLES	POLFF	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 6: Disability Occurs Before Eligibility for Optional Retirement: Example 6a</p> <p>In this example, an individual covered by the Police and Firefighters Plan hired before 1980 retires based on a disability in the line of duty in October 1997. At retirement, he is age 45 with 18 years, 5 months, and 11 days of departmental service. Since he had performed less than 20 years of service and had not reached the age of eligibility for an optional retirement, the Federal Benefit Payment does not begin at retirement. When the disability annuitant reaches age 55, he satisfies the age and service requirements for deferred retirement. At that time (August 20, 2007), the Federal Benefit Payment begins. It is based on the 18 years, 1 month, and 17 days of departmental service performed as of June 30, 1997, all at the 2.5 percent accrual rate.</p> <p>Annuitant Information: Birth date: 08/20/52 Hire date: 05/14/79 Average salary: \$47,788.64 Final salary: \$50,938.00</p> <p>Total Annuity Computation: Separation date: 10/24/97 Department service: 18/05/11 .025 service: 18.416667 Total: \$22,002.70 Total/month: \$1,834.00 2/3 of average pay: \$31,859.11 Monthly: \$2,655.00</p> <p>Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 18/01/17 .025 service: 18.083333 Total: \$21,604.43 Total/month: \$1,800.00; deferred</p>	3081

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56	Benefits Calculations	Disability Claims	DISABILITY RETIREMENT EXAMPLES	POLFF	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 6b</p> <p>In this example, an individual covered by the Teachers Plan hired before 1996 retires based on a disability in December 1997. At retirement, she is age 49 with 27 years and 4 months of departmental service which includes 3 years, 3 months and 14 days of excess leave without pay (prior to June 30, 1997). Since she does not qualify for optional retirement at separation, the Federal Benefit Payment does not begin at separation. When the disability annuitant reaches age 62, she will satisfy the age and service requirements for deferred retirement. At that time (March 9, 2010), the Federal Benefit Payment begins. The time attributable to the excess leave without pay is subtracted from the service used to compute the Federal Benefit Payment. Since the excess leave without pay occurred before June 30, 1997, the deferred Federal Benefit Payment is based on the 23 years and 6 months of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 13 and 6 months of service at the 2 percent accrual rate.</p> <p>Annuitant Information: Birth date: 03/09/48 Hire date: 09/01/70 Average salary: \$53,121.00 Total Annuity Computation: Separation date: 12/31/97 Department service: 27/04/00 Excess LWOP: 03/03/14 .015 service: 5; .0175 service: 5; .02 service: 14 Total: \$23,506.04 Total/month: \$1,959.00</p> <p>Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 26/10/00 Excess LWOP: 03/03/14 .015 service: 5; .0175 service: 5; .02 service: 13.5 Total: \$22,974.83</p>	3082

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57	Benefits Calculations	Disability Claims	DISABILITY RETIREMENT EXAMPLES	POLFF	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 7: Disability Occurs After Eligibility for Optional Retirement: Example 7a</p> <p>In this example, an individual covered by the Police and Firefighters Plan hired before 1980 retires based on a disability in the line of duty in October 1997. At retirement, she is age 55 with 24 years, 5 months, and 11 days of departmental service. Since she was also eligible for optional retirement at the time of separation, the Federal Benefit Payment commences at retirement. It is based on the 24 years, 1 month, and 17 days of departmental service performed as of June 30, 1997. Thus, the Federal Benefit Payment is based on 20 years of service at the 2.5 percent accrual rate and 4 years and 1 month of service at the 3 percent accrual rate. The total annuity is based on the disability formula and is equal to two-thirds of average pay because that amount is higher than the 63.25 percent payable based on total service.</p> <p>Annuitant Information: Birth date: 10/01/42 Hire date: 05/14/73 Average salary: \$47,788.64 Final salary: \$50,938.00</p> <p>Total Annuity Computation: Separation date: 10/24/97 Department service: 24/05/11 .025 service: 20; .03 service: 4.416667 Total: \$30,226.31 Total/month: \$2,519.00 2/3 of average pay: \$31,859.11 Monthly: \$2,655.00</p> <p>Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 24/01/17 .025 service: 20; .03 service: 4.083333 Total: \$29,748.43 Total/month: \$2,479.00</p>	3083

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58	Benefits Calculations	Disability Claims	DISABILITY RETIREMENT EXAMPLES	POLFF	<p>his is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 7b</p> <p>In this example, an individual covered by the Teachers Plan hired before 1996 retires based on a disability in December 1997. At retirement, he is age 60 with 27 years and 4 months of departmental service which includes 3 years, 3 months and 14 days of excess leave without pay (prior to June 30, 1997). Since he qualifies for optional retirement at separation, the Federal Benefit Payment begins at retirement. Since the excess leave without pay occurred before June 30, 1997, and the total annuity is based on actual service (that is, exceeds the guaranteed disability minimum), the time attributable to the excess leave without pay is subtracted from the service used to compute the Federal Benefit Payment and total benefit. The Federal Benefit Payment is based on 23 years and 6 months of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 13 years and 6 months of service at the 2 percent accrual rate. The total annuity payable is based on 24 years of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 14 years of service at the 2 percent accrual rate.</p> <p>Annuitant Information: Birth date: 03/09/37 Hire date: 09/01/70 Average salary: \$53,121.00 Total Annuity Computation: Separation date: 12/31/97 Department service: 27/04/00 Excess LWOP: 03/03/14 .015 service: 5; .0175 service: 5; .02 service: 14 Total: \$23,506.04 Total/month: \$1,959.00</p> <p>Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 26/10/00 Excess LWOP: 03/03/14 .015 service: 5; .0175 service: 5; .02 service: 13.5 Total: \$22,974.83 Total/month: \$1,915.00</p>	3084
59	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	Teachers	If a teacher leaves the school system before reaching eligibility for retirement, the teacher may still be entitled to a pension.	1311
60	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	Teachers	To qualify for a deferred benefit, the teacher must have five or more years of eligible DCPS service upon leaving the school system and elect a deferred annuity.	1312
61	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	Teachers	Monthly payments begin when the teacher reaches age 62, and terminate upon the death of the teacher.	1313
62	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	Teachers	If an eligible teacher does not elect a deferred annuity, the teacher will receive a refund of his or her retirement contributions and service is forfeited. DCRB requires an application for the refund.	1314
63	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	Teachers	If a teacher returns to work after getting a refund, the teacher must repay that amount (plus interest) in order to regain his or her plan service credit.	1315

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64	Benefits Calculations	Estimated & Final Payments	Final Average Earnings- Hired Before November 10, 1996	Teachers	[31-1226(a)(3) – 38-2021.05] / / Final Average Earnings- Hired Before November 10, 1996 / Years and months of total service and average pay will be used to calculate the basic plan benefit as follows: 1.5% of average salary x total service up to 5 years PLUS 1.75% of average salary x total service between 5 and 10 years PLUS 2% of average salary x total service over 10 years Applicable to teachers hired before 11/10/96 only. The Federal benefit payment is calculated by computing total Federal service for the period up through 6/30/97, e.g., eligible service, creditable service requiring a deposit that was paid in full by 6/30/97, and military performed by 6/30/97. The Federal benefit is 1.5% of average salary x 5 years of total Federal service + 1.75% of average salary x total Federal service between 5-10 years + 2% of average salary x total Federal service over 10 years. The difference between the total benefit payment and the Federal benefit payment is the District benefit payment	1317
65	Benefits Calculations	Estimated & Final Payments	Final Average Earnings- Hired On Or After November 10, 1996	Teachers	The benefit will be calculated as follows: 2% of average salary x number of years of total service	1318
66	Benefits Calculations	Estimated & Final Payments	Final Average Earnings- Hired On Or After November 10, 1996	Teachers	The benefits calculated according to the above formulas will be reduced if a teacher chooses a payment method that provides benefits to certain survivors after death. See discussion below on survivor annuities.	1319
67	Benefits Calculations	Estimated & Final Payments	Example Of Disability Benefit Calc 1of2	Teachers	The following example demonstrates how a benefit is calculated where the teacher retires with a disability at age 45 with 18 years of service, including five years of eligible service. The teacher's average salary is \$55,000: 1.5% of average salary times service up to 5 years \$4,125 plus 1.75% of average salary times service between 5 and 10 years \$4,812.50 plus 2% of average salary times service over 10 years (8 years) \$8,800 Annual actual basic benefit: \$17,737.50	1324
68	Benefits Calculations	Estimated & Final Payments	Deferred Retirement Benefit	Teachers	Deferred benefits are calculated the same way as voluntary retirement benefits, by using average salary and years of service at the time of separation.	1328
69	Benefits Calculations	Estimated & Final Payments	Deferred Retirement Benefit	Teachers	A deferred annuity becomes payable at age 62. If a teacher leaves before having acquired five years of eligible service, the teacher receives a refund of mandatory and voluntary contributions made instead of a pension. Under this retirement benefit, teachers are not eligible for continuing health benefits or for life insurance benefits	1329

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70	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	Surviving spouse and eligible children: If a spouse and one or more eligible children survive a teacher who dies before retirement, both are entitled to monthly survivor annuity payments. Surviving spouses receive the benefit described above only if the teacher dies before retiring.	1342
71	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	Eligible children are entitled to survivor benefits regardless of whether the teacher dies before or after retirement.	1343
72	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	<p>If a teacher dies in service with at least 18 months of eligible service, or after voluntary, involuntary, or disability retirement, and the teacher is survived by a spouse, each eligible child will receive the lesser of:</p> <ul style="list-style-type: none"> -- 60% of the teacher's average salary divided by the number of eligible children; the following is an example of the calculator: -- \$5,076 (if the teacher was hired before January 1, 1980); \$4,836 (if the teacher was hired on or after January 1, 1980); or -- \$15,228 (if the teacher was hired before January 1, 1980) divided by the number of eligible children; \$14,508 (if the teacher was hired on or after January 1, 1980) divided by the number of eligible children. <p>Payments begin on the date after the teacher dies, and continue until the last day of the month before the children die,</p>	1344
73	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	<p>Eligible children only - If a teacher dies in service with at least 18 months of eligible service, or after voluntary, involuntary, or disability retirement, and the teacher is not survived by a spouse, each eligible child receives the lesser of the following example:</p> <ul style="list-style-type: none"> -- 75% of the teacher's average salary divided by the number of eligible children, -- \$6,189 (if the teacher was hired before January 1, 1980); \$5,880 (if the teacher was hired on or after January 1, 1980) -- \$18,540 (if the teacher was hired before January 1, 1980) divided by the number of eligible children; \$17,640 (if the teacher was hired on or after January 1, 1980) divided by the number of eligible children. 	1345
74	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	If the surviving spouse dies or the eligibility of a child ends, the survivor annuity of any other eligible child or children is recomputed and paid as if the spouse or eligible child whose annuity terminated had not survived the teacher.	1346
75	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	Surviving dependent parents only -- If a teacher dies before retiring, the teacher's dependent parent or parents can receive a benefit if there is no surviving spouse and/or child.	1347
76	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	Payment will be made jointly to the teacher's parents and will continue until they both die.	1348

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77	Benefits Calculations	Estimated & Final Payments	Lump Sum Elig: Termination Of Benefits	Teachers	If a teacher dies without a survivor, or with one or more survivors and the right to a survivor annuity terminates before a claim for a survivor annuity is filed, or a former teacher not retired dies, the lump sum credit (i.e., all unrefunded mandatory and voluntary contributions and amounts paid to purchase creditable service) is paid in accordance with the order of precedence clause. If all annuity rights based upon the service of the deceased teacher terminate before the total annuity paid equals the lump sum credit, the difference is paid in accordance with the order of precedence clause.	1349
78	Benefits Calculations	Estimated & Final Payments	Lump Sum Benefit	Teachers	[31-1231(a) – 38-2021.09] [31-1232(c)(1)(A)] [31-1232(c)(1)(B) – 38-2021.10] [31-1232(c)(1)(C)] / / Lump Sum Benefit / The beneficiary designated by the teacher in writing or the individual(s) listed below, in the order described below, will receive a refund of the teacher's entire lump sum credit (i.e., all retirement deductions from the teacher's salary plus amounts deposited by the teacher for prior service credit), if: - a teacher dies before completing 18 months of service with the D.C. public day school system; - a teacher dies without a spouse, child or dependent parent who is eligible for a survivor's annuity; - a teacher dies with at least one such survivor, but the rights of all survivors to an annuity are extinguished before a claim for a survivor annuity is made; or	1375
79	Benefits Calculations	Estimated & Final Payments	Lump Sum Benefit	Teachers	If all annuity rights based upon the service of a deceased teacher, including the rights of the teacher, surviving spouse, eligible children, and dependent parents, and a survivor annuitant, terminate before the total annuity paid equals the lump sum credit, the difference shall be paid to the individual(s) listed below in the order described below.	1376
80	Benefits Calculations	Estimated & Final Payments	Lump Sum Benefit	Teachers	If an annuitant dies, any annuity accrued and unpaid (e.g., any unpaid annuity accrued by a teacher during the month of his or her death) shall be paid in the order described below. [31-1232(b)(1)(B)], [31-1232(b)(1)(C)], [31-1232(b)(1)(D)], [31-1232(b)(1)(E)], [31-1232(b)(1)(F)] / / Lump Sum Benefit / The order of precedence for payments described in this section is as follows: - First, to any beneficiary or beneficiaries designated by the teacher in a signed and witnessed statement received by the Mayor before the teacher's death - if there is no such person, then to the surviving husband or wife of the teacher; - if there is no such person, then to the surviving children, and descendants of deceased children by representation. Note--surviving children do not have to be "eligible" children. - if there is no such person, then to the surviving parents of the teacher or the survivor of them - if there is no such person, then to the appointed executor or administrator of the teacher's estate - if there is no such person, then to other next of kin whom the Mayor determines to be entitled under the laws of the	1377
81	Benefits Calculations	Estimated & Final Payments	Benefits Calculations	POLFF	For POLFF, need to modify the Final Average Earnings (FAE) code (and maybe the process for data entry) to evaluate whether to include or exclude the Longevity component of Active Pay when calculating the gross annuity.	1403
82	Benefits Calculations	Estimated & Final Payments	Other Requirements	POLFF	As part of the Post-56 development effort, a decision was made to defer the development of additional warning message criteria (withhold 8%, in addition to 7%). Need to expand the acceptable entry criteria on the Earnings Information page for Military Service Deposits to accept 8% as a valid value.	1407

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83	Benefits Calculations	Estimated & Final Payments	Calculating The Benefit	POLFF	Create a indicator on the Final Average Earnings (FAE) Calculation results for Metro Police (no DC Firefighters) that reflects different attributes of the FAE when the page is displayed. Based on the specific data for each retiree calculated the system, the label will display whether or not the High-1 or High-3 earnings periods for FAE include Longevity.	1415
84	Benefits Calculations	Estimated & Final Payments	Calculating The Benefit	Both POLFF and Teachers	The system needs to produce a Retirement Calculation Worksheet for new Retirees.	1416
85	Benefits Calculations	Estimated & Final Payments	Calculating The Benefit	Both POLFF and Teachers	DC: Eliminate steps to convert service periods to decimal format and the need to enter this figure into the sytem. ODCP: OPRS requests to eliminate the necessity to convert service periods from the Y/M/D format to decimal format outside of the system, and then enter this figure into the system.	1424
86	Benefits Calculations	Estimated & Final Payments	Calculating The Benefit	Both POLFF and Teachers	Pension Administration has capabilities for end users to create a Group, then execute mass calculations in batch.	1425
87	Benefits Calculations	Estimated & Final Payments	Calculating The Benefit	Both POLFF and Teachers	A summary report was requested for those new annuitants (retirees and survivors) who have Excludable Income in a Pay Period.	1426
88	Benefits Calculations	Estimated & Final Payments	Optional Retirement	POLFF	A member can elect optional retirement before reaching age 60. The requirements depend on when the member was hired: - If a member was hired before February 15, 1980, he or she can elect to retire at any age after at least 20 years of police or fire service. - If a member was hired on or after February 15, 1980, he or she can elect to retire at any time after reaching age 50 with at least 25 years of police or fire service. - If a member was hired on or after November 10, 1996, he or she can elect to retire at any age once he or she has at least 25 years of police or fire service.	2589
89	Benefits Calculations	Estimated & Final Payments	Optional Retirement	POLFF	A member must notify the head of his or her department in writing at least 60 days before the date of planned retirement.	2590
90	Benefits Calculations	Estimated & Final Payments	Optional Retirement	POLFF	The retirement payments start upon retirement and continue through the last day of the last full month preceding the member's death.	2591
91	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	POLFF	If a member leaves the department before reaching eligibility for retirement, he or she may be entitled to a deferred retirement annuity.	2592
92	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	POLFF	To qualify for a deferred annuity, the member must have five or more years of police or fire service upon separation and cannot have elected to receive a refund of retirement contributions. Monthly payments begin on the first day of the month when the member reaches age 55 or the first day of the month after the member separates from service, whichever is later, and are based on years and months of total service and the average pay earned when separated from police or fire service.	2593
93	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	POLFF	Instead of taking the deferred retirement annuity, a member can elect to receive a refund of contributions upon leaving the department.	2594

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94	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	POLFF	Doing so voids all rights to an annuity. However, a former member can later repay the refunded contributions, plus interest, at any time before reaching age 55 in order to have the deferred benefits restored.	2595
95	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	POLFF	A member who receives a refund and who is subsequently re-appointed to the police force or fire department may have his or her prior period of service restored if he or she elects, at the time of re-appointment, to redeposit the amount refunded plus interest. The member can make repayment in a lump sum or in no more than 60 installments.	2596
96	Benefits Calculations	Estimated & Final Payments	Deferred Retirement	POLFF	A member who leaves the department with fewer than 5 years of police or fire service for reasons other than a disability incurred in the performance of duty does not qualify for a deferred retirement benefit. However, the member will be entitled to a lump sum refund of his or her retirement contributions. The record will be flagged and a letter will automatically be generated notifying the member of their options.	2597
97	Benefits Calculations	Estimated & Final Payments	Basic Retirement Benefit	POLFF	Once total years of service and average pay are determined, those numbers are used to determine the basic retirement benefit.	2607
98	Benefits Calculations	Estimated & Final Payments	Basic Retirement Benefit	POLFF	The basic retirement benefit is adjusted periodically for cost-of-living increases.	2608
99	Benefits Calculations	Estimated & Final Payments	Basic Retirement Benefit	POLFF	The plan has three formulas for determining retirement benefits. Application of each formula depends on the date a member was hired.	2609
100	Benefits Calculations	Estimated & Final Payments	Basic Retirement Benefit	POLFF	A member's maximum retirement annuity cannot exceed 80% of his or her average salary at the time of retirement, except that the annuity may exceed the 80% ceiling plus unused sick leave in the calculation of total service causes the benefit to be greater than the 80% maximum.	2610
101	Benefits Calculations	Estimated & Final Payments	Basic Retirement Benefit -FOR MEMBERS HIRED AFTER FEBRUARY 15, 1980 BUT BEFORE NOVEMBER 10, 1996:	POLFF	The retirement annuity for members hired after February 15, 1980 but before November 10, 1996 equals: 2.5% of average pay times police or fire service up to 25 years PLUS 3% of average pay times police or fire service over 25 years PLUS 2.5% of average pay times years of creditable service	2611
102	Benefits Calculations	Estimated & Final Payments	Basic Retirement Benefit - FOR MEMBERS HIRED ON OR AFTER NOVEMBER 10, 1996	POLFF	The retirement annuity equals: 2.5% of average pay times years of total service (police or fire service plus creditable service)	2612

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103	Benefits Calculations	Estimated & Final Payments	Basic Retirement Benefit - FOR MEMBERS HIRED ON OR AFTER NOVEMBER 10, 1996	POLFF	If a member elects an additional survivor's benefit for his or her spouse or eligible child, below, the basic retirement salary will be reduced to provide for those payments.	2614
104	Benefits Calculations	Estimated & Final Payments	Deferred Retirement Benefit	POLFF	The formula for a deferred annuity uses average pay and total service at the time a member leaves the department. For a member who first became a member on or after September 29, 1977, the deferred annuity is 2.5% of average salary for each year of total service up to 25 years, and 3% of average salary for each year of total service after 25 years. For members hired before September 29, 1977, the deferred annuity is 2.5% of average salary for each year of total service up to 20 years, and 3% of average salary for each year of total service after 20 years.	2615
105	Benefits Calculations	Estimated & Final Payments	Deferred Retirement Benefit	POLFF	The maximum deferred retirement salary permitted by the plan is 80% of average pay at the time of separation from service.	2616
106	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	Both POLFF and Teachers	Cost of Living Adjustments. Annuities are increased effective March 1 of each year if the Consumer Price Index (CPI) shows that there has been an increase in the cost-of-living increase to civil service annuities equals the percentage rate of the increase in the CPI since the last prior cost-of-living increase. These adjustments are reflected in annuity checks dated April 1. The first increase after retirement is pro-rated; 1/12 of the total increase is paid for each month annuity was payable before the effective date of increase, with any portion of a month counting as a full month. The annuity must be payable for at least one day in the month of retirement [i.e., annuity must be due and payable for the 31st in the case of a 31 day month, the 30th in the case of a 30 day month, or 28th (or 29th in a leap year) for retirement in February].	2787
107	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	Both POLFF and Teachers	The only case of a maximum for a COLA is the 3 percent for post October, 1996 annuitants. There is a only a maximum salary for equalization.	2789
108	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	Benefits for all children with a surviving spouse under the Police/Fire Plan were increased October 1, 2001 to 2918 (updated by future COLAs) for 3 or less children and to 8754 (updated by future COLAs) divided by the number of children (4 or more children).	2790
109	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	Equalization is based on salary schedule, and COLAs are based on the CPI (provided by Personnel) and is required by Law.	2791
110	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	Police and Firefighters who retired on an annuity commencing on or before March 1, 2000, and their survivors are entitled to a prorated increase equal to the product of 1/12 of the 3.4% increase multiplied by the number of months (not to exceed 12 months) for which the annuity was payable before March 1, 2001. for all survivor annuities (spouses and children), the first COLA is prorated based on the commencing date of the survivor annuity.	2792

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111	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	The equalization pay raise for eligible retirees is effective the first of the month after the effective date of the pay raise for active members.	2793
112	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	The process must check against the salary maximum for the group and ensure that the salary is not exceeded by the application of the equalization amount.	2794
113	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	The system must be able to determine if Equalization will apply, as based on retirement date.	2796
114	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	The system must be able to determine the Equalization percentage amount for an employee, and add the appropriate Tech pay.	2797
115	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	Section 11013(a) of the Balanced Budget Act of 1997, P.L. 105-33, codified at DC Code 4-624, as amended, provides for a cost-of-living adjustment (COLA) of annuities effective March 1 of each year and payable April 1 of each year for District of Columbia Police Officers and Firefighters and their survivors. The annuity adjustments are as follows: 1) Police officers and firefighters who retired on an annuity commencing on or before March 1, 2000, and their survivors are entitled to the full 3.4% increase. 2) Police officers and firefighters who retired on an annuity commencing after March 1, 2000, and their survivors are entitled to a prorated increase equal to the product of 1/12th of the 3.4% increase multiplied by the number of months (not to exceed 12 months) for which the annuity was payable before March 1, 2001. For all survivor annuities (spouses and children), the first COLA is prorated based on the commencing date of the survivor annuity.	2798
116	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	Equalization Process: If a member retired before February 15, 1980, the member's annuity is increased by equalization. If the member retired on or after February 15, 1980, and for all survivor annuities, the annuity is adjusted once a year for COLAs.	2799
117	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	Only allow groups to be selected that are eligible for Equalization.	2802
118	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	The increases are solely dependent on whether the active members receive an increase.	2803
119	Benefits Calculations	Estimated & Final Payments	COST OF LIVING ADJUSTMENTS	POLFF	The retired member receive the same percentage increase as active members for the grade and step at which they retired.	2804
120	Benefits Calculations	Estimated & Final Payments	Disability Retirement	POLFF	Total Benefit Payment: Disability: Disability (if hire date < 2/15/80) **[Regular – not in line of duty] 2% * All Service (departmental and credited) * FAE (with a minimum 40% FAE and a maximum 70% FAE) **[Regular – in line of duty] 2.5% * All Service * FAE (with a minimum 66.66% FAE and a maximum 70% FAE) Effective Date: Start of Plan, Group: DC Metro Police and Fire Department.	2805
121	Benefits Calculations	Estimated & Final Payments	Disability Retirement	POLFF	Total Benefit Payment: Disability: Disability (if hire date >= 2/15/80) ** [Regular – not in line of duty]./[4-615(b)] 70% Basic Salary (not high three – not FAE) * % of disability as determined by the board (with a minimum 30% final basic salary and a maximum 70% (covered above)) ** [Regular – in line of duty] Same as above except minimum 40% final basic salary Effective Date: Start of Plan, Group: DC Metro Police and Fire Department.	2806

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122	Benefits Calculations	Estimated & Final Payments	Disability Retirement	POLFF	Metropolitan Police and Fire who are hired after 2/14/80: The input of a disability percent for those former members who retired on Regular Disability or on Disability in Line of Duty is required. This Disability Percent applies only to POLFF Plan.	2807
123	Benefits Calculations	Estimated & Final Payments	Disability Retirement	POLFF	To qualify for benefits, the member must be permanently unable to perform his or her duties because of physical or mental disability.	2808
124	Benefits Calculations	Estimated & Final Payments	Estimated & Final Payments	POLFF	(a) For employees separated for retirement as of the June 30, 1997, include credit for unused sick leave that is creditable under the applicable plan.	3036
125	Benefits Calculations	Estimated & Final Payments	UNUSED SICK LEAVE	POLFF	(b) For employees separated for retirement after June 30, 1997, no unused sick leave is creditable toward Federal Benefit Payments.	3037
126	Benefits Calculations	Estimated & Final Payments	DEPOSIT SERVICE	Teachers	(a) Teachers Plan. (1) Periods of civilian service that were not subject to retirement deductions at the time they were performed are creditable for Federal Benefit Payments under the Teachers Plan if the deposit for the service was paid in full to the Teachers Plan as of June 30, 1997.	3041
127	Benefits Calculations	Estimated & Final Payments	DEPOSIT SERVICE	Teachers	(2) No credit is allowed for Federal Benefit Payments under the Teachers Plan for any period of civilian service that was not subject to retirement deductions at the time it was performed if the deposit for the service was not paid in full as of June 30, 1997.	3042
128	Benefits Calculations	Estimated & Final Payments	DEPOSIT SERVICE	POLFF	The Police and Firefighters Plan is subject to the benefit Federal/District liability rules in the Balanced Budget Act. (b) Police and Firefighters Plan. No credit is allowed for Federal Benefit Payments under the Police and Firefighters Plan for any period of civilian service that was not subject to retirement deductions at the time that the service was performed. (See definition of "governmental service" at D.C. Code section 4-607(15) (1997).)	3043
129	Benefits Calculations	Estimated & Final Payments	REFUNDED SERVICE	Both POLFF and Teachers	(a) Periods of civilian service that were subject to retirement deductions but for which the deductions were refunded to the employee are creditable for Federal Benefit Payments if the redeposit for the service was paid in full to the District government as of June 30, 1997 (b) No credit is allowed for Federal Benefit Payments for any period of civilian service that was subject to retirement deductions but for which the deductions were refunded to the employee if the redeposit for the service was not paid in full to the District government as of June 30, 1997.	3044
130	Benefits Calculations	Estimated & Final Payments	REFUNDED SERVICE	Teachers	There are two ways that early and late adjustments can apply: involuntary early retirement, or early voluntary, when permitted. Different rules apply for each situation. For Federal/District benefit purposes, early voluntary is treated like a disability retirement; early involuntary is treated like voluntary retirement. In both cases, the annuitant is entitled to an immediate annuity.	3046

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131	Benefits Calculations	Estimated & Final Payments	DEFERRED RETIREMENT EXAMPLES	POLFF	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 8: All Service Before June 30, 1997</p> <p>In this example, an individual covered by the Police and Firefighters Plan hired before 1980 separated in March 1986 with title to a deferred annuity. In November 1997, he reaches age 55 and becomes eligible for the deferred annuity based on his 15 years, 9 months, and 8 days of departmental service, all at the 2.5 percent accrual rate. The total annuity is based on the same 15 years, 9 months, and 8 days of service all at the 2.5 percent accrual rate. Since all the service is creditable as of June 30, 1997, the Federal Benefit Payment equals the total annuity.</p> <p>Annuitant Information: Birth date: 03/09/37 Hire date: 09/01/70 Average salary: \$30,427.14 Final salary: \$45,415.00</p> <p>Total Annuity Computation: Birth date: 11/20/42 Hire date: 06/01/70 Separation date: 03/08/86 Department service: 15/09/08 .025 service: 15.75 Total: \$11,980.69 Total/month: \$998.00</p> <p>Federal Benefit Payment Computation: Birth date: 11/20/42 Hire date: 06/01/70 Freeze date: 03/08/86 Department service: 15/09/08 .025 service: 15.75 Total: \$11,980.69</p>	3085

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132	Benefits Calculations	Estimated & Final Payments	DEFERRED RETIREMENT EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 9: Service Straddles June 30, 1997</p> <p>In this example, an individual covered by the Police and Firefighters Plan hired before 1980 separated in December 1997 with title to a deferred annuity. In November 2007, he will reach age 55 and becomes eligible to receive a deferred annuity. At that time, the Federal Benefit Payment begins. It is based on the 18 years and 1 month of departmental service performed as of June 30, 1997, all at the 2.5 percent accrual rate. The total annuity begins at the same time, based on his 18 years, 6 months, and 8 days of departmental service, all at the 2.5 percent accrual rate.</p> <p>Annuitant Information: Birth date: 11/20/52 Hire date: 06/01/79 Average salary: \$30,427.14 Final salary: \$45,415.00</p> <p>Total Annuity Computation: Separation date: 12/08/97 Department service: 18/06/08 .025 service: 18.5 Total: \$14,072.55 Total/month: \$1,173.00</p> <p>Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 18/01/00 .025 service: 18.083333 Total: \$13,755.60 Total/month: \$1,146.00, deferred</p>	3086
133	Benefits Calculations	Plan Rules Engine	Plan Membership	Teachers	Teachers for the D.C. public day schools become members of the pension plan as of their hire date	1261
134	Benefits Calculations	Plan Rules Engine	Plan Membership	Teachers	Participation in the plan is mandatory for all active teachers.	1262
135	Benefits Calculations	Plan Rules Engine	Plan Membership	Teachers	If a teacher leaves the system after joining the plan and is later rehired, the teacher rejoins the plan on the day he or she resumes work.	1263
136	Benefits Calculations	Plan Rules Engine	Cost Of The Plan	Teachers	A teacher's basic retirement contributions equal 7% of the teacher's annual salary if hired before November 10, 1996.	1265
137	Benefits Calculations	Plan Rules Engine	Cost Of The Plan	Teachers	If a teacher was hired on or after November 10, 1996, the basic retirement contributions equal 8% of the teacher's annual salary.	1266
138	Benefits Calculations	Plan Rules Engine	Cost Of The Plan	Teachers	Basic contributions are deducted from a teacher's salary and deposited in the District retirement fund each pay period; no further contributions are made to the retirement fund, which consists of deposits for service made before July 1, 1997 and earnings thereon.	1267
139	Benefits Calculations	Plan Rules Engine	Cost Of The Plan	Teachers	Contributions made to the retirement fund may be refunded if instructional employee leaves the school system before retirement.	1268
140	Benefits Calculations	Plan Rules Engine	Cost Of The Plan	Teachers	Under the plan, eligibility to retire is determined by the number of years of eligible DCPS service and age.	1275
141	Benefits Calculations	Plan Rules Engine	Cost Of The Plan	Teachers	Years and months of total service are used along with the teacher's "final average salary" to determine how much the annuity will be.	1276

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142	Benefits Calculations	Plan Rules Engine	Breaks In Service	Teachers	Teachers incur a break in service where they resign or leave the D.C. public school system for reasons other than normal retirement, disability or authorized leaves of absence. Teachers leaving DCPS who become employees of charter schools within 60 days may elect to remain in the DC retirement system without incurring a break in service. When a teacher has a break in service, plan membership stops. Unless the teacher is eligible for and elects a deferred annuity, the teacher will receive a lump sum refund of contributions, any amounts deposited for credited service, and voluntary contributions.	1292
143	Benefits Calculations	Plan Rules Engine	Breaks In Service	Teachers	If a teacher received a refund after leaving the school system, the teacher may regain their previous service by depositing the money received, plus interest, back to the District retirement fund. Interest is calculated at the rate equal to average rate of return on investment (adjusted to the nearest 1/8th of 1%) for the District fund for the period beginning on the 1st day of the 1st month which begins after the end of the service period with respect to which the deposit is made and ending on the last day of the month which precedes the month during which the deposit is made if the teacher makes a lump sum payment or during which the teacher makes the first payment of he makes installment payments, and is payable for this period, except that for so much of the period that occurs before 2/15/80, the rate= currently %3 but can change; 2/15/80-9/30/80=average rate of U.S. bonds; and if the payment is made in installments, each payment includes interest on the portion of the payment being deposited and calculated at the rate of return of the District fund for the month preceding the month in which the first payment is made.	1293
144	Benefits Calculations	Plan Rules Engine	Breaks In Service	Teachers	If a teacher did not receive a refund upon separation from the school system, the teacher regains the previous school service upon return to work.	1294
145	Benefits Calculations	Plan Rules Engine	Breaks In Service	Teachers	If a teacher is rehired, he or she may keep credit for service earned, before and during the break, as follows - A teacher receives credit for any creditable service earned during the break in service provided the required deposits to the District retirement fund are made. The system must validate that the Teacher is contributing at the right percentage and alert users as needed.	1295
146	Benefits Calculations	Plan Rules Engine	Breaks In Service	Teachers	Teachers resume earning school credit on the day they return to work.	1296
147	Benefits Calculations	Plan Rules Engine	Public Charter School Service	Teachers	A teacher who is granted a leave of absence without pay by the Chancellor of Schools for the purpose of permitting the teacher to accept a position at a District public charter school receives credit for such service.	1297
148	Benefits Calculations	Plan Rules Engine	Public Charter School Service	Teachers	A teacher who terminates his or her employment with the D.C. public school system and who becomes an employee of a District public charter school within 60 days of termination may, at the time the teacher commences employment with the District public charter school, elect to remain in the teachers' retirement plan and receive credit for the District public charter school service. The charter school that employs the teacher must continue to make the same contributions to the District retirement fund that the District would have made if he or she had remained a District public school employee.	1298
149	Benefits Calculations	Plan Rules Engine	Public Charter School Service	Teachers	Charter school must submit contributions at the end of each pay period calculated on base salary	1299
150	Benefits Calculations	Plan Rules Engine	Involuntary Retirement	Teachers	Teachers may qualify for an immediate pension if they are retired involuntarily for reasons other than misconduct or delinquency.	1301
151	Benefits Calculations	Plan Rules Engine	Involuntary Retirement	Teachers	Such teachers are eligible with at least: - 25 years of total service, including at least 5 years of eligible service, or - 20 years of total service, at age 50 or above, with at least 5 years of eligible service.	1302

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152	Benefits Calculations	Plan Rules Engine	Involuntary Retirement	Teachers	A pension based upon involuntary retirement will be reduced by 1/6 of 1% for each full month that the teacher is under age 55 on the date of separation.	1303
153	Benefits Calculations	Plan Rules Engine	Involuntary Retirement	Teachers	A teacher's pension begins the day after separation for involuntary retirement . Pension payments continue until death.	1304
154	Benefits Calculations	Plan Rules Engine	Involuntary Retirement Benefit	Teachers	<p>Following is a sample calculation of an involuntary retirement pension. The example assumes the teacher was retired involuntarily at age 50 with 20 years of service and an average salary of \$55,000.</p> <p>1.5% of average salary (\$55,000) times years of service up to 5 \$4,125.00 plus 1.75% of average salary (\$55,000) times service between 5 and 10 years \$4,812.50 plus 2% of average salary (\$35,000) times service over 10 years \$11,000.00</p> <p>Gross annual benefit \$19,937.50 minus Early payment reduction (1/6 of 1% per month x 60 months, or 10% for 5 years) - 1,993.75 equals Annual benefit payable at 50 \$17,943.75</p>	1321
155	Benefits Calculations	Plan Rules Engine	Benefits For Former Spouses	Teachers	Retired teachers and their survivors receive annuity payments in monthly installments on the first business day of the month. Each annuity is stated as an annual amount, 1/12 of which, fixed at the nearest dollar, constitutes the monthly rate.	1383
156	Benefits Calculations	Plan Rules Engine	Benefits For Former Spouses	Teachers	Monthly payments cover benefits for the preceding month.	1384
157	Benefits Calculations	Plan Rules Engine	Other Requirements	Both POLFF and Teachers	<p>Remove adjustment of from date whereby the 31st became the 1st of the next month.</p> <p>This item is based on Treasury regulation 31 C.F.R. § 29.105(b)(2), which provides: "An annuity does not accrue on the 31st day of any month except that annuity accrues on the 31st day of the initial month if the employee's annuity commences on the 31st day of a 31-day month." Basically, the 31st day of a month is only counted when the teacher retires as of the 30th day of that month, so that the annuity begins on the next day, the 31st.</p>	1392
158	Benefits Calculations	Plan Rules Engine	Other Requirements	Both POLFF and Teachers	<p>If the hire date is the 31st, the employee get credit for the day (as though the hire date were the 30th). Credit is not allowed for the 31 under any other circumstances (i.e., month=30 days).</p> <p>On the other end, a retiree who annuity commences on the 31st (that is, separates on the 30th) is entitled to credit for the 30th and to a day's annuity for the 31st. The same is true for a survivor where the annuitant dies on the 30th. In all other circumstances, the 31st is ignored for determining amount annuity due.</p> <p>The 28th day of February constitutes 3 days (or the 29th day of February constitutes 2 days) for benefit accrual. For</p>	1393

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159	Benefits Calculations	Plan Rules Engine	Other Requirements	Teachers	When a surviving spouse dies and leaves eligible surviving children, the annuity of the eligible surviving child or children is recalculated and paid as though the spouse had not survived. If there is more than one eligible surviving child and an eligible child becomes ineligible, the annuity of the remaining eligible surviving child or children is recalculated and paid as though the newly ineligible child had not survived the teacher.	1394
160	Benefits Calculations	Plan Rules Engine	Calculating The Benefit	Both POLFF and Teachers	Elapsed days may not exceed one year in a calendar year	1441
161	Benefits Calculations	Plan Rules Engine	Calculating The Benefit	Teachers	While on workers compensation, teachers receive up to 6 months of credit for each fiscal year they are receiving workers compensation benefits with a maximum of 2 years on workers compensation. Not to exceed 1 full year of credit in total.	1442
162	Benefits Calculations	Plan Rules Engine	Calculating The Benefit	Both POLFF and Teachers	Accrued and unused sick and/or annual leave may not be used to meet the service requirements for eligibility to retire or for computing average salary.	1451
163	Benefits Calculations	Plan Rules Engine	Breaks in Service	Teachers	Contribution Rate = 8%. (if hire date on or >=11/10/96)	1592
164	Benefits Calculations	Plan Rules Engine	Eligibility for Retirement - Voluntary Retirement	Teachers	Early late reduction months should be calculated as the number of full 30 day periods between benefit commencement date and the age at 55.	1594
165	Benefits Calculations	Plan Rules Engine	Eligibility for Retirement - Involuntary Retirement	Teachers	Involuntary Separation--benefit Federal/District Liability - Total Benefit and the Federal Benefit is reduced 1/6 of 1% for full months where the employees age is less than 55	1595
166	Benefits Calculations	Plan Rules Engine	Eligibility for Retirement - Involuntary Retirement	Teachers	Teachers are 100% vested in their own contributions, 0% vested in government funds, and are deferred benefit eligible after 5 years of school service.	1596
167	Benefits Calculations	Plan Rules Engine	Calculating the Benefit	Both POLFF and Teachers	Average salary calculation based on days; 30 day months; 360 day years.	1598
168	Benefits Calculations	Plan Rules Engine	Other Requirements	Both POLFF and Teachers	When a retroactive pay raise is applied to employees, attention must be given to individuals who retired after the effective date of the raise, (but before it was applied to the salary tables) and annuity benefits must be recalculated to show change in employee salary and subsequent change to annuity benefit.	1668
169	Benefits Calculations	Plan Rules Engine	Plan Membership	POLFF	Members of the Metropolitan Police Force and the Fire Department of the District of Columbia become participants in the retirement plan automatically upon starting work.	2559
170	Benefits Calculations	Plan Rules Engine	Plan Membership	POLFF	If a member leaves the D.C. Police or Fire Department after joining the plan and is later rehired before reaching eligibility for retirement, he or she will automatically rejoin the plan the day work resumes.	2560
171	Benefits Calculations	Plan Rules Engine	Plan Participation - COST OF THE PLAN	POLFF	A member's contribution equals 7% of basic salary if hired before November 10, 1996.	2561
172	Benefits Calculations	Plan Rules Engine	Plan Participation - COST OF THE PLAN	POLFF	Contributions equal 8% for members hired on or after November 10, 1996.	2562

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173	Benefits Calculations	Plan Rules Engine	Plan Participation - COST OF THE PLAN	POLFF	Each pay period, contributions are deducted from members' pay and deposited in the District of Columbia Police Officers and Fire Fighters' Retirement Fund (the "District retirement fund")	2563
174	Benefits Calculations	Plan Rules Engine	Plan Participation - COST OF THE PLAN	POLFF	A member's total service is made up of police or fire service and creditable service. Under the plan, a member's years of police or fire service determine when the person is eligible for retirement benefits. Years of total service determine, along with average pay, how much the retirement benefits will be.	2564
175	Benefits Calculations	Plan Rules Engine	Counting Years of Service	POLFF	Members earn police or fire service for each full year and additional full months worked for the Metropolitan Police Force of the D.C. Fire Department and make contributions to the retirement fund.	2565
176	Benefits Calculations	Plan Rules Engine	Counting Years of Service	POLFF	However, sick leave cannot be used to determine eligibility for retirement benefits.	2566
177	Benefits Calculations	Plan Rules Engine	Counting Years of Service	POLFF	A member may elect to receive credit for police or fire service if he or she has taken approved leave without pay to serve as a full-time employee or officer of a labor organization that bargains with the D.C. government on behalf of police officers or fire fighters.	2567
178	Benefits Calculations	Plan Rules Engine	Counting Years of Service	POLFF	To do so, a member must notify the Mayor's Office within 60 days of starting the leave and make monthly deposits to the District retirement fund. The deposit must cover the normal monthly cost of the pension of a plan member receiving the basic salary in effect for the grade the member was in when he or she left on leave.	2568
179	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	A person has a break in service under the retirement system if he or she resigns from or leaves the police force or fire department for reasons other than normal or disability retirement. Plan membership stops upon a break in service. At that time, the member will receive a lump sum refund of his or her contributions, plus any amounts deposited for creditable service, if he or she has fewer than five years of police or fire credit.	2582
180	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	If a member separates from his or her department for reasons other than mandatory, optional or disability retirement before he or she is eligible to retire, but after completing five years of police or fire service, he or she is eligible for a deferred pension payable at age 55 or upon separation, whichever is later.	2583
181	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	A member who is eligible for a deferred pension may instead elect, at the time of separation, to receive a refund of his or her retirement contributions. Doing so voids all rights to an annuity. However, a former member can later repay the refunded contributions, plus interest, at any time before reaching age 55 in order to have the deferred benefits restored.	2584
182	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	A member resumes earning police or fire service upon return to work.	2585

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183	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	<p>Periods of LWOP in excess of 6 months in a calendar (or fiscal for teachers) year are not creditable, including excess LWOP during refunded and nondeduction service. (See Chapter 20 for more information about creditable service.) [Edited Source: CSRS and FERS Handbook for Personnel and Payroll Offices, Chapter 50, Computation of Annuity Under the General Formula, Section 50C1.1-2 CSRS Examples]</p> <p>The (1 or) 3 years of service used for the high- (1 or) 3 average pay need not be continuous, but they must be consecutive periods of service. Thus, two or more separate periods of employment may be joined, provided there is no intervening service.</p> <p>The basic annual pay rate of an employee who works at different pay rates (whether on a regular or irregular schedule or on dual or multiple assignments with different rates of pay involved) is the employee's basic pay earnings for each calendar year, plus any additional pay that could have been earned in any period of LWOP not exceeding 6 months in any calendar year.</p> <p>If excess LWOP falls within the high- (1 or) 3 average period, subtract the excess LWOP from the high- (1 or) 3 period by backing up the high- (1 or) 3 period equal to the amount of excess LWOP. For example, if the high- (1 or) 3 average pay period contains 8 months of LWOP, use 6 months of the LWOP in the computation of the high- (1 or) 3 average pay and give no credit for the excess 2 months of LWOP. However, back up the high- (1 or) 3 average pay period by 2 months in order to compute an average pay based on (1 or) 3 full years of service. [Edited Source: CSRS and FERS Handbook for Personnel and Payroll Offices, Chapter 50, Computation of Annuity Under the General Formula, Section 50A2.1-4, High-3 Average Pay, F. Excess LWOP]</p> <p>The excess LWOP in any given year is always subtracted from the end of the calendar or fiscal year unless specific dates for LWOP are provided.</p>	2586
184	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	<p>A member who, during any war or national emergency as proclaimed by the President or declared by the Congress, has left or leaves his position to enter the military service shall not be considered, for the purposes of this subchapter, as separated from his position by reason of such military service, unless he shall apply for and receive his salary deductions: Provided, that such member shall not be considered as retaining such position beyond December 31, 1957, or the expiration of 5 or more years of such military service pending authorized orders, whichever is later.</p>	2587
185	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	POLFF	<p>Mandatory retirement for police officers and fire fighters is age 60, unless extended in the discretion of the Mayor.</p>	2588
186	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	<p>If a member retired before February 15, 1980, the member's annuity is increased by the same percentage increase in salary to which he or she would have been entitled if he or she were in the active service. The increase will become effective the month after it is provided to active employees. [4-624 (b), 5-718(b)]</p>	2599
187	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	<p>Total years of service. Total years of service include years and months of police or fire service, plus any creditable service (provided the required deposits, if any, have been made). Unused sick leave is counted in determining total</p>	2600
188	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	<p>If a member was hired before February 15, 1980, average pay is the highest annual rate resulting from averaging the member's basic salary as a D.C. police officer or firefighter for 12 consecutive months, with each rate weighted by the time it was in effect.</p>	2601
189	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	<p>"High 1" – weighted average of the highest paid consecutive twelve months of those hired before February 15, 1980. [4-607(17) / 4-607 (6)]</p>	2602
190	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	<p>If a member was hired on or after February 15, 1980, average pay is the highest annual rate resulting from averaging the member's basic salary as a D.C. police officer or firefighter for 36 consecutive months, with each rate weighted by the time it was in effect.</p>	2603
191	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	<p>Average pay includes increases for longevity, provided the member has at least 25 years of active service</p>	2604

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192	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	<p>For the purpose of determining eligibility for inclusion of longevity pay in the calculation of District benefit payments, the District interprets "active service" to include only satisfactory police service and satisfactory military service while a member of the MPD. A member who has five years of creditable military service before joining the MPD, and who has 20 years of MPD service, does not have 25 years of active service.</p> <p>Police officers receive longevity pay after 15 years of MPD service, but the longevity pay is subject to retirement deductions and included in the average pay for retirement, only after he or she reaches 25 years of "active service" (MPD and other creditable service.)</p> <p>Firefighters with 15 years of "total service" are eligible to have longevity pay (formerly called base retention incentive) be counted as base pay for the retirement annuity calculation, per the collective bargaining agreement.</p>	2605
193	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	Members who retired before August 29, 1972, are ineligible for inclusion of longevity pay in the calculation of Federal and District benefit payments Period	2606
194	Benefits Calculations	Plan Rules Engine	Counting Years of Service	Both POLFF and Teachers	The benefits formula for participants who are eligible to accrue benefits at a 3% rate requires that calculations regarding length of service be performed in a specific order. The length of departmental service--unused sick leave qualifies as departmental service--must be calculated first because only that service can qualify for the 3% accrual rate. Only years and months of departmental service are used toward 3% accrual.	2725
195	Benefits Calculations	Plan Rules Engine	Counting Years of Service	Both POLFF and Teachers	<p>If the hire date is the 31st, the employee get credit for the day (as though the hire date were the 30th). Credit is not allowed for the 31 under any other circumstances.</p> <p>On the other end, a retiree who annuity commences on the 31st (that is, separates on the 30th) is entitled to credit for the 30th and to a day's annuity for the 31st. In all other circumstances, the 31st is ignored for determining amount annuity due.</p> <p><i>The rule is stated in the regulations at 31 CFR 29.105(b).</i></p>	2728
196	Benefits Calculations	Plan Rules Engine	Counting Years of Service		Departmental service is computed at 2 ½ percent for eligible service up to 20 years for those hired before 2/15/80 and up to 25 years for those hired after 2/14/80. Any departmental service over the eligible service amount (20 or 25 years) is computed at 3 percent.	2729
197	Benefits Calculations	Plan Rules Engine	Counting Years of Service	Both POLFF and Teachers	Unused Sick Leave: Unused sick leave is added to the number of years and months of service for police, firefighter and teacher annuity computation purposes.	2730
198	Benefits Calculations	Plan Rules Engine	Breaks in Service	Both POLFF and Teachers	<p>Following Leave Without Pay categories do not count towards credited service:</p> <p>Absent Without Leave (AWOL) - Not creditable.</p> <p>Suspension - Not creditable.</p>	2752
199	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	A member who, during any war or national emergency as proclaimed by the President or declared by the Congress, has left or leaves his position to enter the military service shall not be considered, for the purposes of this subchapter, as separated from his position by reason of such military service, unless he shall apply for and receive his salary deductions: Provided, that such member shall not be considered as retaining such position beyond December 31, 1957, or the expiration of 5 years of such military service, whichever is later.	2753
200	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	In order to receive credit for such service, a member must (1) have had retirement deductions, other than for Social Security, taken from his or her pay; (2) have received a refund of all contributions, including interest earned (if any) on the contributions; and (3) deposit in the District retirement fund the entire refund amount plus interest accrued	2754

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201	Benefits Calculations	Plan Rules Engine	Breaks in Service	POLFF	<p>Longevity Pay. Each member of the Metropolitan Police Force (MPF) in active service who has completed at least fifteen years of continuous service (satisfactory police service and satisfactory military service while a member of the MPF) is entitled to receive an increase in pay while in active service. This additional compensation will be included for purposes of computing average pay, and thus retirement benefits, for members who complete at least 25 years of "active service" before retirement. [4-415(a) – 5-544.01] Longevity is included in retirement annuity calculations beginning with the January 2001 payment.</p> <p>For the purpose of determining eligibility for inclusion of longevity pay in the calculation of Federal benefit payments, the U.S. Department of the Treasury interprets "active service" to include satisfactory police service and all other creditable service (e.g., military service and purchased civilian Government service accrued before retirement). For example, a member who has five years of creditable military service before joining the MPF, and who has 20 years of MPF service, has 25 years of active service. The member will have longevity pay included in his or her average pay for the member's Federal benefit payment if he or she has at least 15 years of continuous service with the MPF.</p> <p>For the purpose of determining eligibility for inclusion of longevity pay in the calculation of District benefit payments, the District interprets "active service" to include only satisfactory police service and satisfactory military service while a member of the MPF. A member who has five years of creditable military service before joining the MPF, and who has 20 years of MPF service, does not have 25 years of active service. The member will not have longevity pay included in his or her average pay for the member's District benefit payment (regardless of the number of years of "continuous service" he or she may have).</p> <p>Members who retired before August 29, 1972, are ineligible for inclusion of longevity pay in the calculation of Federal and District benefit payments.</p>	2755
202	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	POLFF	Benefit eligibility is based only on departmental service.	2756
203	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	POLFF	Disability Duty: From the Start./(If hire date is <2/15/1980) Effective Date: Start of Plan, Group: Metropolitan Police and D.C. Fire Department	2757
204	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	POLFF	Disability Non-Duty: 5 years departmental service (If hire date >=2/15/1980). Effective Date: Start of Plan, Group: Metropolitan Police and D.C. Fire Department	2758
205	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	POLFF	Disability Non-Duty: 5 years departmental service (If hire date is <2/15/1980) Effective Date: Start of Plan, Group: Metropolitan Police and D.C. Fire Department	2759
206	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	POLFF	Disability terminates if individual is found recovered or restored to earning capacity; Board makes the determination if an employee is recovered from a disability.	2760
207	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	POLFF	WHEN A MEMBER DOES NOT PURCHASE THEIR MILITARY SERVICE AND THEY RECEIVE A ssa benefit, they will lose their military service at their SSA normal retirement age.	2761
208	Benefits Calculations	Plan Rules Engine	Eligibility to Receive a Pension	Both POLFF and Teachers	Refund of separated eligible employees contributions, no interest, must terminate & file application, and be out of the plan for 30 days before you can receive refund. (if paid date >=term date +30) Effective Date: Start of Plan, Group: All eligible.	2762

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209	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	Both POLFF and Teachers	Retirement benefit is based on two items: Service Total service = (Other service + Departmental service) Retirement benefit is based on two items: Average Salary Disability in Service - FAE = Basic salary. Hire date >= 2/15/80 [4-616(E)(2)(D)]	2769
210	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	Police	The percentage of longevity pay may change during the period used to calculate average salary.	2776
211	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	Police	If a currently retired police officer or member of the Metropolitan Police Department retired on or after August 29, 1972, and had 25 years of active service at the time of retirement, longevity pay will be used in calculating the Federal portion of the annuity to which the officer or member is entitled.	2777
212	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	Police	Public Law 106-554 precludes applying longevity pay in the annuity calculations for an annuitant with less than 25 years of active service at retirement.	2778
213	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	Both interpretations(Federal and District) exclude military service for which the member receives retired pay, with certain limited exceptions for a service-connected disability.	2779
214	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	The post-56 military service exclusion does not affect the member's quantity of "active service" or "continuous service" for the purpose of calculating longevity eligibility and amount.	2780
215	Benefits Calculations	Plan Rules Engine	Calculating the Retirement Benefit	POLFF	For the purpose of determining eligibility for inclusion of longevity pay in the calculation of District benefit payments, the District interprets "active service" to include only satisfactory police service and satisfactory military service while a member of the POLFF. A member who has five years of creditable military service before joining the POLFF, and who has 20 years of POLFF service, does not have 25 years of active service. The member will not have longevity pay included in his or her average pay for the member's District benefit payment (regardless of the number of years of "continuous service" he or she may have).	2781
216	Benefits Calculations	Plan Rules Engine	Claiming Benefits	Both POLFF and Teachers	Total Benefit needs to be rounded to the nearest dollar.	2880
217	Benefits Calculations	Plan Rules Engine	GENERAL PRINCIPLES FOR DETERMINING SERVICE CREDIT TO CALCULATE FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	Only service performed on or before June 30, 1997 is credited toward Federal Benefit Payments Period.	3025

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218	Benefits Calculations	Plan Rules Engine	GENERAL PRINCIPLES FOR DETERMINING SERVICE CREDIT TO CALCULATE FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	Service is counted toward Federal Benefit Payments only if all requirements for the service to be creditable are satisfied as of June 30, 1997.	3026
219	Benefits Calculations	Plan Rules Engine	GENERAL PRINCIPLES FOR DETERMINING SERVICE CREDIT TO CALCULATE FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	The transactions might have been a pre-97 date but since the service is not totally paid for by the commencement date it becomes a post 97 POS.	3027
220	Benefits Calculations	Plan Rules Engine	GENERAL PRINCIPLES FOR DETERMINING SERVICE CREDIT TO CALCULATE FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	Except as otherwise provided, the amount of Federal Benefit Payments is computed based on retirement eligibility as of the separation date and service creditable as of June 30, 1997.	3028
221	Benefits Calculations	Plan Rules Engine	GENERAL PRINCIPLES FOR DETERMINING SERVICE CREDIT TO CALCULATE FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	Excess Leave without pay as of June 30, 1997 is subtracted from the service used to calculate the federal benefit.	3029
222	Benefits Calculations	Plan Rules Engine	GENERAL PRINCIPLES FOR DETERMINING SERVICE CREDIT TO	Both POLFF and Teachers	Any service performed after June 30, 1997, should be credited toward District Benefit Payments.	3030
223	Benefits Calculations	Plan Rules Engine	GENERAL PRINCIPLES FOR DETERMINING SERVICE CREDIT TO	Both POLFF and Teachers	Service after the freeze date shall not be credited for purposes of determining the amount of any Federal benefit payment. Nothing shall be construed to affect the crediting of such service for any other purpose under the District Retirement Program.	3031
224	Benefits Calculations	Plan Rules Engine	CALCULATION OF THE AMOUNT OF FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	Except for disability retirements after June 30, 1997, and certain death benefits based on deaths after June 30, 1997, in which the calculation is not based upon length of service; for cases in which some service is creditable on or before June 30, 1997, and some service is creditable after June 30, 1997, Federal Benefit Payments are computed under the rules of the applicable plan as though (See examples 7B - Req. #60 and 9 - Req. #62):	3047
225	Benefits Calculations	Plan Rules Engine	CALCULATION OF THE AMOUNT OF FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	The Federal / District Ratio is how to compute the Federal portion of the benefit payment. Total benefit minus the Federal benefit is the DC benefit payment. If retired before 7/1/97: Total = Federal Payment. The system does not need to calculate this since ODCP will be providing the split percentages to be applied to encompass a single payment.	3048
226	Benefits Calculations	Plan Rules Engine	CALCULATION OF THE AMOUNT OF FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	For all plans, the Federal payment will not exceed 100% total benefit.	3049

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227	Benefits Calculations	Plan Rules Engine	CALCULATION OF THE AMOUNT OF FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	Early Voluntary: Federal benefit payment is 0; until one reaches deferred age. District benefit for full amount of the annuity commences immediately. Federal benefit calculated in the same way as disability benefit. Federal benefit is not reduced for age.	3050
228	Benefits Calculations	Plan Rules Engine	CALCULATION OF THE AMOUNT OF FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	The total annual benefit is computed to the penny (and stored) and then rounded to the nearest dollar (and stored). The Federal benefit is computed to the penny and rounded to the nearest dollar (and stored). The difference between the two rounded amounts (a rounded amount), if any, is the District share.	3051
229	Benefits Calculations	Plan Rules Engine	COMPUTED ANNUITY EXCEEDS THE STATUTORY MAXIMUM	Both POLFF and Teachers	(a) In cases in which the total computed annuity exceeds the statutory maximum: (1) Federal Benefit Payments may equal total benefits even if the employee had service after June 30, 1997.	3052
230	Benefits Calculations	Plan Rules Engine	COMPUTED ANNUITY EXCEEDS THE STATUTORY MAXIMUM	Both POLFF and Teachers	(2) If the employee had sufficient service as of June 30, 1997, to qualify for the maximum annuity under the plan, the Federal Benefit Payment is the maximum annuity under the plan. This will be the entire benefit except for any amount in excess of the normal maximum due to unused sick leave, which is the responsibility of the District. (See example 3 - Regs. #51 and 52)	3053
231	Benefits Calculations	Plan Rules Engine	COMPUTED ANNUITY EXCEEDS THE STATUTORY MAXIMUM	Both POLFF and Teachers	(b) If the employee did not perform sufficient service as of June 30, 1997, to reach the statutory maximum benefit, but has sufficient service at actual retirement to exceed the statutory maximum, the Federal Benefit Payment is the amount earned through June 30, 1997. The non-Federal-Benefit-Payment portion of the total benefit consists of only the amount by which the total benefit payable exceeds the Federal Benefit Payment.	3054
232	Benefits Calculations	Plan Rules Engine	ANNUITY ADJUSTMENTS	Both POLFF and Teachers	In cases in which the total annuity and the Federal Benefit Payment are equally impacted by a change, such as normal cost-of-living adjustments or pay adjustments, the Federal/District ratio to total annuity from the initial Federal/District Ratio will be provided by DCRB. The system must differentiate gross amounts payable by the Federal/District ratio.	3067

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233	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor.- Opt. Retirement, no sick leave: Example 1a</p> <p>In this example, an individual covered by the Police and Firefighters Plan hired before 1980 retires in October 1997. At retirement, he is age 51 with 20 years and 3 days of departmental service plus 3 years, 4 months, and 21 days of military service that preceded the departmental service. The Federal Benefit Payment begins at retirement. It is based on the 19 years, 8 months, and 22 days of departmental service and 3 years, 4 months, and 21 days of military service performed as of June 30, 1997. Thus, the Federal Benefit Payment is based on 23 years and 1 month of service, all at the 2.5 percent accrual rate. The total annuity is based on 23 years and 4 months of service, all at the 2.5 percent accrual rate.</p> <p>Annuitant Information: Birth date: 09/10/46 Hire date: 10/09/77 Average salary: \$45,680.80 TOTAL Annuity Computation, Police Optional, Pre-80 hire: Separation date: 10/11/97 Department service: 20/00/03 Other service: 03/04/21 .025 service: 23.333333; .03 service: Total: \$26,647.12 Total/month: \$2,221.00 Federal Benefit Calculation, Police Optional, Pre-80 hire: Freeze date: 06/30/97 Department service: 19/08/22 Other service: 03/04/21 .025 service: 23.083333; .03 service:</p>	3072

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234	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor..Example 2 - Unused Sick Leave Credit</p> <p>In this example, an individual covered by the Police and Firefighters Plan and hired before 1980 retires in March 1998. At retirement, she is age 48 with 24 years, 8 months, and 6 days of departmental service plus 6 months and 4 days of other service (deposit paid before June 30, 1997) and 11 months and 11 days of unused sick leave. For a police officer (or a non-firefighting division firefighter) such an amount of sick leave would be 1968 hours (246 days, based on a 260-day year, times 8 hours per day). For a firefighting division firefighter, such an amount would be 2069 hours (341 days divided by 360 days per year times 2184 hours per year). The Federal Benefit Payment begins at retirement. It is based on the 23 years, 11 months, and 23 days of departmental service performed as of June 30, 1997, and 6 months and 4 days of other service. Thus, the Federal Benefit Payment is based on 20 years departmental and 6 months of other service at the 2.5 percent accrual rate and 3 years and 11 months of service at the 3.0 percent accrual rate. The total annuity is based on 20 years and 6 months of service at the 2.5 percent accrual rate and 5 years and 7 months of service at the 3 percent accrual rate.</p> <p>Annuitant Information: Birth date: 05/01/49 Hire date: 07/08/73 Average salary: \$61,264.24 TOTAL Annuity Computation, Police pre-80 hire: Separation date: 03/13/98 Department service: 24/08/06 Other service: 00/06/04 Sick leave: 00/11/11 .025 service: 20.5; .03 service: 5.583333 Total: \$41,659.68 Total/month: \$3,472.00 Federal Benefit Computation, Police pre-80 hire: Freeze date: 06/30/97 Department service: 23/11/23 Other service: 00/06/04 .025 service: 20.5; .03 service: 3.916667</p>	3074

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235	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor.. Example 3: Calculated Benefit Exceeds Statutory Maximum: Example 3a</p> <p>In this example, an individual covered by the Police and Firefighters Plan hired before 1980 retires in March 1998. At retirement, he is age 55 with 32 years and 17 days of departmental service. The Federal Benefit Payment begins at retirement. It is based on the 31 years, 3 months, and 17 days of departmental service performed as of June 30, 1997. Thus, the Federal Benefit Payment is based on 20 years of service at the 2.5 percent accrual rate and 11 years and 3 months of service at the 3.0 percent accrual rate. However, the annuity is limited to 80 percent of the basic salary at the time of retirement. (This limitation does not apply to the unused sick leave credit). The annuity computed as of June 30, 1997 equals the full benefit payable; there for the Federal Benefit Payment is the total benefit.</p> <p>Annuitant Information: Birth date: 06/14/42 Hire Date: 03/14/66 Average Salary: \$75,328.30 Final Salary: \$77,180.00 Total annuity computation: Separation Date: 03/30/98 Department Service: 32/00/17 .025 Service: 20; .03 Service: 12 Total: \$64,782.34 Total/month: \$5,399.00 Maximum: \$61,744.00; \$5,145.00 Federal Benefit Payment Computation: Freeze Date: 03/30/97 Department Service: 31/03/17 .025 Service: 20; .03 Service: 11.25 Total: \$63,087.45 Total/month: \$5,257.00</p>	3075

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236	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor.Example 3b</p> <p>In this example, the individual in example 3A also has 6 months of unused sick leave at retirement. The sick leave credit is not subject to the 80% limitation and does not become creditable service until the date of separation. For a police officer (or a non-firefighting division firefighter) such an amount of sick leave would be 1040 hours (130 days based on a 260 day year, times 8 hours per day). For a firefighting division firefighter, such an amount would be 1092 hours (180 days divided by 360 days per year times 2184 hours per year). Six months of unused sick leave increases the annual total benefit by 1.5 percent of the average salary, or in the example by \$94 per month. The District is responsible for the portion of the annuity attributable to the unused sick leave because it became creditable at retirement, that is, after June 30, 1997.</p> <p>Annuitant Information: Birth date: 06/12/42 Hire date: 03/14/66 Average salary: \$75,328.30 Final salary: \$77,180.00 Total Annuity Computation Separation date: 03/30/98 Department service: 32/00/17 .025 service: 20; .03 service: 12 Total wo/sl credit: \$64,782.34 Total/month: \$5,399.00 Max wo/sl credit: \$61,744.00 Max w/sl credit: \$62,873.92 Monthly benefit: \$5,239.00 Federal Benefit Payment Computation Freeze date: 06/30/97 Department service: 31/03/17 .025 service: 20; .03 service: 11.25 Total: \$63,087.45 Total/month: \$5,257.00</p>	3076

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237	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 4: Excess Leave Without Pay; Teachers Optional [Pre-96 hire]</p> <p>In this example, an individual covered by the Teachers Plan hired before 1996 retires in February 1998. At retirement, she is age 64 with 27 years of departmental service and years, 7 months, and 28 days of other service (creditable before June 30, 1997). However, only 6 months of leave in a fiscal year without pay may be credited toward Retirement Under the Teachers Plan. She had 3 months and 18 days of excess leave without pay as of June 30, 1997. Since the excess leave without pay occurred before June 30, 1997, the time attributable to the excess leave without pay is subtracted from the service used in both the Federal Benefit Payment and the total benefit computations. The Federal Benefit Payment begins at retirement. It is based on the 32 years and 8 months of service (32 years, 11 months, and 28 days minus 3 months and 18 days and the partial month dropped); years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 22 years and 8 months of service at the 2 percent accrual rate. The total annuity is based on 33 years and 4 months of service (33 years, 7 months and 28 days minus 3 months and 18 days and the partial month dropped) 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate and 23 years and 4 months of service at the 2 percent accrual rate. Note: For the Teachers Plan, section 1230(a) of title 31 of the DC Code (1997) allows for 6 months leave without pay in any fiscal year. For the Police and Firefighters Plan, section 610(d) of title 4 of the DC Code (1997) allows for 6 months leave without pay in any calendar year.</p> <p>Annuitant Information: Birth date: 11/04/33 Hire date: 03/01/71 Average salary: \$53,121.00 Total Annuity Computation Separation date: 02/28/98 Department service: 27/00/00 Other service: 06/07/28 Excess LWOP: 00/03/18 .015 service: 5; .0175 service: 5; .02 service: 23.333333 Total: \$33,421.98 Total/month: \$2,785.00 Federal Benefit Payment Computation</p>	3077

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238	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 5: Service Credit Deposits: Example 5a(i)</p> <p>An individual covered by the Teachers Plan hired before 1996 retires in October 1997. At retirement, he is age 61 with 30 years and 3 days of departmental service plus 3 years, 4 months, and 21 days of other service that preceded the departmental service for which the deposit was fully paid on or before June 30, 1997. The Federal Benefit Payment begins at retirement. It is based on the 29 years, 8 months, and 22 days of departmental service and 3 years, 4 months, and 21 days of service performed as of June 30, 1997. Thus, the Federal Benefit Payment is based on 33 years and 1 month of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 23 years and 1 month of service at the 2 percent accrual rate. The total annuity is based on 33 years and 4 months of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate and 23 years and 4 months of service at the 2 percent accrual rate.</p> <p>Annuitant Information: Birth date: 09/10/36 Hire date: 10/09/67 Average salary: \$45,680.80 Total Annuity Computation Separation date: 10/11/97 Department Service: 30/00/03 Other service: 03/04/21 Deposit paid before freeze date .015 service: 5; .0175 service: 5; .02 service: 23.333333 Total: \$28,740.85 Total/month: \$2,395.00 Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 29/08/22 Other service: 03/04/21 Deposit paid before freeze date .015 service: 5; .0175 service: 5; .02 service: 23.08333; 13 days dropped Total: \$28,512.45</p>	3078

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239	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 5a(ii): Teachers Optional [Pre-96 hire]</p> <p>In this example, the employee in example 5A did not pay any of the deposit to obtain credit for the 3 years, 4 months, and 21 days of other service as of June 30, 1997. Thus, none of the other service is used in the computation of the Federal Benefit Payment. An individual covered by the Teachers Plan hired before 1996 retires in October 1997. At retirement, he is age 61 with 30 years and 3 days of departmental service plus 3 years, 4 months, and 21 days of other service that preceded the departmental service for which the deposit was paid in full in October 1997 (at retirement). The Federal Benefit payment begins at retirement. It is based on only the 29 years, 8 months, and 22 days of departmental service performed as of June 30, 1997; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 19 years and 8 months of service at the 2 percent accrual rate. The total annuity is based on 33 years and 4 months of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate and 23 years and 4 months of service at the 2 percent accrual rate.</p> <p>Annuitant Information: Birth date: 09/10/36 Hire date: 10/09/67 Average salary: \$45,680.80 Total Annuity Computation: Separation date: 10/11/97 Department service: 30/00/03 Other service: 03/04/21 Total deposit paid after 6/30/97 .015 service: 5; .0175 service: 5; .02 service: 23.333333 Total: \$28,740.85 Total/month: \$2,395.00</p> <p>Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 29/08/22 Total deposit paid after 6/30/97 .015 service: 5; .0175 service: 5; .02 service: 19.666667; 22 days dropped Total: \$25,390.90</p>	3079

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240	Benefits Calculations	Plan Rules Engine	ANNUITY EXAMPLES	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 5a(iii)</p> <p>In this example, the employee in examples 5A and B began installment payments on the deposit to obtain credit for the 3 years, 4 months, and 21 days of other service as of June 30, 1997, but did not complete the deposit until October 1997 (at retirement). The other service is not used in the computation of the Federal Benefit Payment because the payment was not completed as of June 30, 1997. Thus, the result is the same as in example 5B.</p> <p>Annuitant Information: Birth date: 09/10/36 Hire date: 10/09/67 Average salary: \$45,680.80 Total Annuity Computation: Separation date: 10/11/97 Department service: 30/00/03 Other service: 03/04/21 Partial deposit paid as of 6/30/97: Deposit completed after 6/30/97: .015 service: 5; .0175 service: 5; .02 service: 23.333333 Total: \$28,740.85 Total/month: \$2,395.00 Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 29/08/22 Partial deposit paid as of 6/30/97 Deposit completed after 6/30/97 .015 service: 5; .0175 service: 5; .02 service: 19.666667; 22 days dropped Total: \$25,390.90 Total/month: \$2,116.00</p>	3080

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241	Benefits Calculations	Plan Rules Engine	EARLY OPTIONAL OR INVOLUNTARY RETIREMENT EXAMPLES	Teachers	<p>Example 11: Early Optional With Age Reduction</p> <p>In this example, an individual covered by the Teachers Plan hired before 1996 retires voluntarily in February 1998, under a special program that allows early retirement with at least 20 years of service at age 50 older, or at least 25 years of service at any age. At retirement, she is 6 full months short of age 55. She has 25 years and 5 months of departmental service; 6 years, 2 months, and 19 days of other service (creditable before June 30, 1997); and 2 months and 9 days of unused sick leave. Since she is not eligible for optional retirement and she is eligible to retire voluntarily only because of the District-approved special program, the Federal Benefit Payment is calculated similar to a disability retirement. It does not begin until she becomes eligible for a deferred annuity at age 62. When it commences the Federal Benefit Payment will be based on the service creditable as of June 30, 1997: 30 years and 11 months of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 20 years and 11 months of service at the 2 percent accrual rate. The total annuity is based on 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate and 21 years and 9 months of service at the 2 percent accrual rate (including the unused sick leave). Because the Federal Benefit payment is based on the deferred annuity, rather than the early voluntary retirement, it is not reduced by the age reduction factor used to compute the total benefit.</p> <p>Annuitant Information: Birth date: 09/20/43 Hire date: 10/01/72 Average salary: \$69,281.14 Total Annuity Computation: Separation date: 02/28/98 Department service: 25/05/00; Other service: 06/02/19 Sick leave: 00/02/09 .015 service: 5; .0175 service: 5; .02 service: 21.75 Total unreduced: \$41,395.48 Age reduction factor: 0.990000 Total reduced: \$40,981.53 Total/month: \$3,415.00 Federal Benefit Payment Computation: Freeze date: 06/30/97</p>	3089

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242	Benefits Calculations	Plan Rules Engine	EARLY OPTIONAL OR INVOLUNTARY RETIREMENT EXAMPLES	Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 12: Involuntary With Age Reduction</p> <p>In this example, an individual covered by the Teachers Plan hired before 1996 retires involuntarily in February 1998. At retirement, she is 6 full months short of age 55. She has 25 years and 5 months of departmental service; 6 years, 2 months, and 19 days of other service (creditable before June 30, 1997); and 2 months and 9 days of unused sick leave. The Federal Benefit Payment begins at retirement. It is based on the 30 years and 11 months of service; 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate, and 20 years and 11 months of service at the 2 percent accrual rate. The total annuity is based on 5 years of service at the 1.5 percent accrual rate, 5 years of service at the 1.75 percent accrual rate and 21 years and 9 months of service at the 2 percent accrual rate (including the unused sick leave). Both the Federal Benefit Payment and the total benefit are reduced by the age reduction factor.</p> <p>Annuitant Information: Birth date: 09/20/43 Hire date: 10/01/72 Average salary: \$69,281.14 Total Annuity Computation: Separation date: 02/28/98 Department service: 25/05/00 Other service: 06/02/19 Sick leave: 00/02/09 .015 service: 5; .0175 service: 5; .02 service: 21.75 Total unreduced: \$41,395.48 Age reduction factor: 0.990000 Total reduced: \$40,981.53 Total/month: \$3,415.00 Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 24/09/00 Other service: 06/02/19 .015 service: 5; .0175 service: 5; .02 service: 20.916667</p>	3090
243	Benefits Calculations	Plan Rules Engine	RECALCULATIONS	Both POLFF and Teachers	<p>System supported recalculations will be made as On-Cycle payments as follows:</p> <p>(a) When a new monthly annuity amount is scheduled for payment. The new Federal/District liability should be automatically calculated by the Recalculation process in system.</p>	3124
244	Benefits Calculations	Plan Rules Engine	RECALCULATIONS	Both POLFF and Teachers	<p>(b) Retroactive Adjustments associated with Recalculations of Annuity where a new Federal/District liability ratio is provide by DCRB will be included in such a way as to "balance the books" to correct the inaccurate Total Annuity Calculation and to correct the original, inaccurate Federal/District liability report.</p>	3125
245	Benefits Calculations	Plan Rules Engine	RECALCULATIONS	Both POLFF and Teachers	The Federal/District liability(to be provided by DCRB) ratios will be the same as the rules for total annuity calculations.	3126
246	Benefits Calculations	Plan Rules Engine	Data Management	Both POLFF and Teachers	The system will store the benefit type provided by ODCP for Phase 3 retirees and survivors converted from PAPS	3150
247	Benefits Calculations	Plan Rules Engine	Data Management	Both POLFF and Teachers	The system will store the future Federal Kick In amount provided for eligible Federal/District Ratio Kick In annuitants	3154
248	Benefits Calculations	Plan Rules Engine	Service Data Page	Both POLFF and Teachers	A Service Data Page will allow the system to display in one location all Federal service, total service, benefit data, and Federal ratio percentages for all annuitants.	3155

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249	Benefits Calculations	Plan Rules Engine	Service Data Page	Both POLFF and Teachers	The Service Data page will display the most current data for all annuitants (phase 0, 1,2 and 3) in a read-only format	3156
250	Benefits Calculations	Plan Rules Engine	Service Data Page	Both POLFF and Teachers	All payment data being displayed will be from after the prorate gross calculation	3157
251	Benefits Calculations	Plan Rules Engine	Service Data Page	Both POLFF and Teachers	Any data unavailable for an annuitant will be displayed as blank	3158
252	Benefits Calculations	Plan Rules Engine	Service Data Page	Both POLFF and Teachers	Annuitants converted from UPPS will not display any service data (Federal service and Total service)	3159
253	Benefits Calculations	Plan Rules Engine	Service Data Page	Both POLFF and Teachers	Phase 3 annuitants will not display the Final Average Earnings, Last Salary Amount, or any service data (Federal service and Total service)	3160
254	Benefits Calculations	Plan Rules Engine	Initial Federal/District Ratio Load	Both POLFF and Teachers	The annuitants will have their Federal/District Ratio loaded into applicable system tables.	3166
255	Benefits Calculations	Plan Rules Engine	Initial Federal/District Ratio Load - Annuity Adjustments	Both POLFF and Teachers	The system should have the ability to calculate annuitants adjustment using the Group Calculation process, including Federal/District Ratio.	3168
256	Benefits Calculations	Plan Rules Engine	Benefit Calculation and Payment Processing	Both POLFF and Teachers	Benefit Calculation and Payment Processing: Automated handling of complex scenarios including Federal/District Ratio service members, military credit, COLAs, refunds, and garnishments.	3185
257	Benefits Calculations	Plan Rules Engine	Change-Friendly Configuration	Both POLFF and Teachers	Change-Friendly Configuration: DCRB staff must be able to manage plan rules, formulas, correspondence templates, and user roles with minimal external support.	3193
258	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Normal, early, and disability retirement	3195
259	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Deferred (vested) retirement processing	3196
260	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Death and survivor benefit processing, including precedence rules	3197
261	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Split-service benefit calculation (District and Federal portions)	3198
262	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Qualified Domestic Relations Orders (QDROs)	3199

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263	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Purchase of prior and military service	3200
264	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Refund and rollover of contributions	3201
265	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Cost-of-living adjustments (COLAs)	3202
266	Benefits Calculations	Plan Rules Engine	Core Pension Processing	Both POLFF and Teachers	Core Pension Processing: The system must support all standard and complex benefit operations for Garnishment processing and offsets	3203
267	Benefits Calculations	Service Purchases	Eligible Service	Teachers	<p>Under the Teachers Plan, to receive credit for CSRS service, the teacher must pay a deposit equal to 7% or 8% of the average annual salary of the class to which the teacher was appointed during the period for which credit is sought, plus interest calculated in accordance with section 38-2023.14(b). The deposit is based on 7% of basic pay if hired under the Teachers Plan before November 10, 1996, and 8% of basic pay if hired on or after such date.</p> <p>The portion of the annuity that results from such credit is reduced by the amount of any annuity the retired teacher is entitled to receive under CSRS for such service, except that such portion of the annuity after reduction shall not be less than the annuity purchasable with the deposit which the teacher is required to make in order to obtain credit for the service.</p> <p>Interest is calculated at the rate equal to average rate of return on investment (adjusted to the nearest 1/8th of 1%) for the District fund for the period beginning on the 1st day of the 1st month which begins after the midpoint of the period with respect to which the deposit is made and ending on the last day of the month that precedes the month during which the deposit is made in a lump sum or or during which the first installment payment is made, except that for so much of the period that occurs before 2/15/80, the rate=3%; 2/15/80-9/30/80=average rate of U.S. bonds; interest is payable for the period that begins on the 1st day of the 1st month that begins after the midpoint of the period with respect to which the deposit is made and ending on the last day of the month preceding the month in which the deposit is made; and provided further that if the payment is made in installments, each payment includes interest on the portion of the payment being deposited and calculated at the rate of return of the District fund for the month preceding the month in</p>	1277
268	Benefits Calculations	Service Purchases	Eligible Service	Teachers	<p>Under the Teacher Plan, the purchase of credit for service in another public school system outside of D.C. is based on 7% or 8% of the average annual salary of the class to which the teacher was appointed during the period for which credit is sought, plus interest calculated in accordance with section 38-2023.14(b).</p> <p>The portion of the annuity that results from such credit is reduced by the amount of any annuity the retired teacher is entitled to receive under any state or municipal retirement or pension system for such service, except that such portion of the annuity after reduction shall not be less than the annuity purchasable with the deposit which the teacher is required to make in order to obtain credit for the service</p>	1278
269	Benefits Calculations	Service Purchases	Credited Service	Teachers	Unused sick leave can be used to determine the years of total service.	1279
270	Benefits Calculations	Service Purchases	Credited Service	Teachers	Teachers may receive credited service for - Certain other service in the D.C. or Federal government that is creditable under the Federal Civil Service Retirement System (but not service creditable under the Federal Employees Retirement System).	1280
271	Benefits Calculations	Service Purchases	Credited Service	Teachers	Teachers may receive credited service for - Authorized leaves of absence without pay for educational purposes up to 6 months per fiscal year.	1281

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272	Benefits Calculations	Service Purchases	Credited Service	Teachers	To receive credit for educational leave of absence with partial pay, a teacher must pay to the District retirement fund the full amount of contributions he or she would have made had such service been rendered on active duty in the D.C. public day schools, with the amount of the contribution based upon the average annual salary of the class to which the teacher is appointed, plus interest. The deposit may be paid in a lump sum or in installments.	1282
273	Benefits Calculations	Service Purchases	Credited Service	Teachers	Periods of LWOP in excess of 6 months in a fiscal year are not creditable, including excess LWOP during refunded and nondeduction service. The 3 years of service used for the high-3 average salary need not be continuous, but they must be consecutive periods of service. Thus, two or more separate periods of employment may be joined, provided there is no intervening service. The basic annual pay rate of an employee who works at different pay rates is the employee's basic pay earnings for each calendar year, plus any additional pay that could have been earned in any period of LWOP not exceeding 6 months in any calendar year. If excess LWOP falls within the high-3 average salary period, subtract the excess LWOP from the high-3 period by backing up the high-3 period equal to the amount of excess LWOP. For example, if the high-3 average salary period contains 8 months of LWOP, use 6 months of the LWOP in the computation of the high-3 average salary, and give no credit for the excess 2 months of LWOP. However, back up the high-3 average salary period by 2 months in order to compute an average pay based on 3 consecutive years of service. The excess LWOP in any given year is always subtracted from the end of the calendar or fiscal year unless specific dates for LWOP are provided.	1283
274	Benefits Calculations	Service Purchases	Credited Service	Teachers	If a teacher served in the armed forces (including the Coast Guard, but not including service in the National Guard except when ordered to active duty in the service of the United States) prior to separation and received an honorable discharge, service is credited for that time.	1284
275	Benefits Calculations	Service Purchases	Credited Service	Teachers	A teacher may not receive credit for any time for which the teacher receives a military pension unless the pension is awarded as the result of a service-connected disability incurred during combat or caused by an instrumentality of war and incurred in the line of duty.	1285, 1286
276	Benefits Calculations	Service Purchases	Credited Service	Teachers	No deposit is required to receive credit for this service.	1287
277	Benefits Calculations	Service Purchases	Credited Service	Teachers	If a teacher takes leave without pay to serve as a full time officer or employee of the WTU or the CSO unions for the purpose of bargaining with the District of Columbia, the teacher may elect to receive credited service for that time.	1288
278	Benefits Calculations	Service Purchases	Credited Service	Teachers	A teacher must notify the DCPS HR within 60 days after leave begins and must make regular contributions to the teachers' retirement fund through DCPS HR in the amount for employee and employer contributions that would have been paid if the teacher were in pay status.	1289
279	Benefits Calculations	Service Purchases	Credited Service	Teachers	Military service is other creditable service but not eligible service.	1291
280	Benefits Calculations	Service Purchases	Calculating The Benefit	Teachers	Elapsed days service accrual for honorable active military service prior to the date of separation – does not need to be purchased.	1443
281	Benefits Calculations	Service Purchases	Calculating The Benefit	Teachers	Service Credit accrued from other public school systems outside of D.C. can be purchased up to 10 years.	1444

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282	Benefits Calculations	Service Purchases	Creditable Service	Both POLFF and Teachers	Service credit for prior Federal or DC service is creditable if allowable under CSRS.	1445
283	Benefits Calculations	Service Purchases	Creditable Service	Teachers	Elapsed days for continuous temporary service immediately prior to probationary appointment is creditable service. Elapsed days as a substitute teacher is not creditable service	1446
284	Benefits Calculations	Service Purchases	Creditable Service	Both POLFF and Teachers	Elapsed days of unused sick leave is creditable service.	1447
285	Benefits Calculations	Service Purchases	Creditable Service	Teachers	LWOP while contributions are being made and serving as a full-time union official is creditable service. The contribution is the amount the teacher and the District would have to contribute if the teacher were in pay status.	1448
286	Benefits Calculations	Service Purchases	Creditable Service	Both POLFF and Teachers	Service consists of eligible and other creditable service.	1547
287	Benefits Calculations	Service Purchases	Creditable Service	Both POLFF and Teachers	Legal Process means: **Any document that qualifies as legal process as defined in 581.103 of Title 5, Code of Federal Regulations; or **Any court order that Federal or DC law permits to cause all or any portion of a payment under the Teachers Plan to be made to a former spouse under chapter 5, subchapter VI, of title 1 of the DC Code.	1548
288	Benefits Calculations	Service Purchases	Cost of the Plan	Teachers	Retirement contributions from the DC Public Schools were pre-taxed starting on September 22,2000.	1550
289	Benefits Calculations	Service Purchases	Cost of the Plan	Teachers	Under teachers plan, school service and other service are treated equally for computation of annuity. Accordingly, all service is combined.	1553
290	Benefits Calculations	Service Purchases	Cost of the Plan	Teachers	Elapsed days service accrued from other public school systems outside of D.C. can be purchased up to 10 years.	1558
291	Benefits Calculations	Service Purchases	Cost of the Plan	Both POLFF and Teachers	Elapsed days for prior Federal or DC service is creditable if allowable under CSRS.	1559
292	Benefits Calculations	Service Purchases	Eligible Service	Teachers	Summer school service is not added service.	1564
293	Benefits Calculations	Service Purchases	Credited Service	Both POLFF and Teachers	The District treats the military service as civilian employment. Consequently, normal Federal/District liability benefit rules apply (see 31 CFR Part 29) should the circumstance ever arise. The Log Category should be changed from Policy to Closed and the Resolution noted as stated in the preceding sentence If hired before 7/1/97 and military service occurred before that date, it's Federal service. If military service performed after that date, it's District service. If hired on or after 7/1/97, all military service is District service no matter when performed.	1567
294	Benefits Calculations	Service Purchases	Credited Service	Teachers	The District is responsible for the computation of benefits including the development of rules for the use of odd days in computation methods under Teachers Plan for service creditable on or after July 1, 1997.	1570
295	Benefits Calculations	Service Purchases	Credited Service	Teachers	8332- Civil Service Retirement System Service – purchase service credit under Teachers Plan rules (identifies service only); benefit not used from Title 5.	1572

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296	Benefits Calculations	Service Purchases	Credited Service		Following Leave Without Pay categories do not count towards credited service: Leave Without Pay for Maternity Leave - Creditable but subject to 6 month rule. Absent Without Leave (AWOL) - Not creditable.	1580
297	Benefits Calculations	Service Purchases	Credited Service	Teachers	Add Handling for: *Charter Schools – Receive service if eligible and election made to remain in the teachers' plan. The system will flag cases where a retired teacher is employed by or on a leave of absence to a charter school to be processed manually. The matter will be referred to counsel for an opinion on calculating the high-three average salary.	1581
298	Benefits Calculations	Service Purchases	Credited Service	Both POLFF and Teachers	Maternity and FMLA are not a different kind of leave; already existing LOA.	1582
299	Benefits Calculations	Service Purchases	Credited Service	Teachers	When on LWOP, results in zero contribution amount for the year, yet the six months service should still be credited.	1584
300	Benefits Calculations	Service Purchases	Credited Service	Teachers	Service should be continued during LOA for charter school. This is not a service purchase and the service module must assume contributions have been made.	1585
301	Benefits Calculations	Service Purchases	Credited Service	Both POLFF and Teachers	Purchase Service Methods to Purchase Service In order to purchase service, it must be done prior to retirement and can be done in one of two ways: 1. Submit a check for full payment of the service purchased plus interest; 2. Elect to make periodic payments through payroll deduction. The payment balance must be made in full prior to retirement for service to be credited as purchased. 3. Elect to pay in installments via payroll deductions - check. The payment balance must be made in full prior to retirement for service to be credited as purchased.	1586
302	Benefits Calculations	Service Purchases	Credited Service	Both POLFF and Teachers	Creditable service towards federal benefit means that it was paid for by June 30, 1997. All requirements, including service credit requirements, must be met by 6/30/97.	1587
303	Benefits Calculations	Service Purchases	Credited Service	Both POLFF and Teachers	The transactions might have been a pre-97 date but since the service is not totally paid for by the commencement date it becomes a post 97 POS. Entire purchase is credited as District service.	1588
304	Benefits Calculations	Service Purchases	Credited Service	Both POLFF and Teachers	(b) Treatment of Service Occurring After Freeze Date. Service after the freeze date shall not be credited for purposes of determining the amount of any Federal benefit payment.	1589
305	Benefits Calculations	Service Purchases	Other Requirements	Both POLFF and Teachers	POS max is 10 yrs for purchase of other Public School service. CSRS- there is no maximum.	1662
306	Benefits Calculations	Service Purchases	Creditable Service	POLFF	A member can obtain credit for service for some periods where he or she did not work for either the police or fire department.	2569

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307	Benefits Calculations	Service Purchases	Creditable Service	POLFF	The creditable service is used along with the police or fire service, and average pay, to determine the amount of retirement benefits.	2570
308	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Creditable service is not used to determine when a person is eligible for retirement.	2571
309	Benefits Calculations	Service Purchases	Creditable Service	Both POLFF and Teachers	<p>Service may be credited for employment in the executive, judicial or legislative branches of the federal government, including government-owned corporations and Gallaudet College. Credit is also available for service with the D.C. government.</p> <p>In order to receive credit for such service, a member must (1) have had retirement deductions, other than for Social Security, taken from his or her pay; (2) have received a refund of all contributions, including interest earned (if any) on the contributions; and (3) deposit in the District retirement fund the entire refund amount plus interest accrued for the period beginning on the first day of the first month which begins after the end of the service with respect to which the deposit is made, and ending on the last day of the month that precedes the month in which the member makes a lump sum payment or the first installment payment.</p> <p>In order to receive credit for such service, a member must (1) have had retirement deductions, other than for Social Security, taken from his or her pay; (2) have received a refund of all contributions, including interest earned (if any) on the contributions; and (3) deposit in the District retirement fund the entire refund amount plus interest accrued for the period beginning on the first day of the first month which begins after the end of the service with respect to which the deposit is made, and ending on the last day of the month that precedes the month in which the member makes a lump sum payment or the first installment payment.</p> <p>The deposit may be made in one lump sum or in installments.</p>	2572
310	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Service may be credited for honorable military service with the U.S. armed forces (Army, Navy, Air Force, Marine Corps, or Coast Guard, but not including the National Guard except when ordered to active duty in the service of the United States) performed before separation from the Police Force or Fire Department.	2575
311	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Credit is allowed for a leave of absence granted a member while performing military service, although this credit must be reduced by the amount of any other leaves of absence without pay that exceed six months total in any calendar year.	2576
312	Benefits Calculations	Service Purchases	Creditable Service	POLFF	A member who, during any war or national emergency, leaves his or her position to enter the military is not considered to have separated from his or her position with the Police Force or the Fire Department because of such service unless he or she (1) applies for and receives a refund of his or her salary deductions; or (2) remains in military service for more than five years.	2577
313	Benefits Calculations	Service Purchases	Creditable Service	POLFF	If participant is a current recipient of a military pension, corresponding military service is not creditable Effective Date: Start of Plan, Group: All eligible.	2579

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314	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Any military service (other than military service covered by military leave with pay from a civilian government position) performed by a member after December 1956 will not be used to determine the aggregate period of service for purposes of calculating retirement benefits if the individual, at the time of retirement, is also entitled to monthly old age or survivor benefits under Social Security. If the member is not entitled to such Social Security benefits at the time of retirement, but is entitled to such Social Security benefits at the time he or she reaches Social Security retirement age (age 65 or greater depending upon the individual's birth date), military service will be excluded and the member's annuity will be recalculated effective on the first day of the month the member reaches Social Security retirement age. On November 22, 2003 a law became effective that permits Plan members to purchase eligible post 1956 military service for purposes of calculating their Plan retirement benefit. The cost to purchase the service is 7% of the base pay the member received while performing the military service. Active members who were not retired on the effective date of the Act, November 22, 2003, must complete their complete their purchases by October 1, 2006, or the date of their retirement. No interest will be charged for any purchase until October 1, 2006. Newly hired police officers will not be charged interest to purchase military service for 2 years from the date they are hired in active service. Interest, once charged, will be calculated in accordance with the provisions of D.C. Code 5-704 (e)(2).	2580
315	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Military service after 1956 is not creditable if participant is entitled to old age or survivors benefit under 202 of Social Security Act unless the military service has been purchased. Effective Date: Start of Plan, Group: All eligible.	2581
316	Benefits Calculations	Service Purchases	Counting Years of Service	POLFF	Purchase Service Methods to Purchase Service In order to purchase service, it must be done prior to retirement and can be done in one of two ways: 1. Submit a check for full payment of the service purchased 2. Elect to make periodic payments through payroll deduction. The payment balance must be made in full prior to retirement for service to be credited as purchased.	2724
317	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Any vested members who are officers or are members of the police or fire department who have withdrawn their contributions can restore creditable service by re-depositing contributions and interest before age 55. (** This is departmental not other as per H.S.) Effective Date: Start of Plan, Group: All eligible.	2733
318	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Elapsed days for military furlough creditable up to 5 contiguous years in case of war or national emergency. Effective Date: Start of Plan, Group: All eligible.	2734
319	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Elapsed days for military Service prior to date of separation is creditable. Effective Date: Start of Plan, Group: All eligible.	2735
320	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Elapsed days of LWOP of 6 months in a calendar year is creditable. Effective Date: Start of Plan, Group: All eligible.	2736
321	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Elapsed days while contributions are being made and serving as an eligible union official is creditable service. Effective Date: Start of Plan, Group: All eligible.	2737
322	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Title 5, 8332 foreign service can be purchased D.C. Service. Effective Date: Start of Plan, Group: DC Metro Police and Firefighters.	2738
323	Benefits Calculations	Service Purchases	Creditable Service	Both POLFF and Teachers	Total service (departmental service plus creditable service) will be used in the benefit formula. Only departmental service can be used in determining eligibility.	2739

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324	Benefits Calculations	Service Purchases	Creditable Service	Both POLFF and Teachers	Amount of Creditable Civilian Service - Fractional Part of a Month in Total Service. In computing an employee's creditable service, the fractional part of a month in the aggregate service is eliminated.	2741
325	Benefits Calculations	Service Purchases	Creditable Service	POLFF	Any military service (other than military service covered by military leave with pay from a civilian government position) performed by a member after December 1956 will not be used to determine the aggregate period of service for purposes of calculating retirement benefits if the individual, at the time of retirement, is also entitled to monthly old age or survivor benefits under Social Security. If the member is not entitled to such Social Security benefits at the time of retirement, but is entitled to such Social Security benefits at the time he or she reaches Social Security retirement age (age 65 or greater depending upon the individual's birth date), military service will be excluded and the member's annuity will be recalculated effective on the first day of the month the member reaches Social Security retirement age.	2747
326	Benefits Calculations	Service Purchases	Foreign Service	POLFF	Title 5, 8332 foreign service and DC teacher service can be purchased D.C. Service. Effective Date: Start of Plan, Group: DC Metro Police and Firefighters.	2905
327	Benefits Calculations	Service Purchases	Lump Sum	POLFF	a)199 Service credit purchase can be paid by lump sum b)Installments with average rate of interest (to be determined / subject too change)	2907
328	Benefits Calculations	Service Purchases	Leave Without Pay	POLFF	Following Leave Without Pay categories do not count towards credited service: Absent Without Leave (AWOL) - Not creditable.	2910
329	Benefits Calculations	Service Purchases	Longevity Pay	POLFF	Longevity Pay. Each member of the Metropolitan Police Force (MPF) in active service who has completed at least fifteen years of continuous service (satisfactory police service and satisfactory military service while a member of the MPF) is entitled to receive an increase in pay while in active service. This additional compensation will be included for purposes of computing average pay, and thus retirement benefits, for members who complete at least 25 years of "active service" before retirement. [4-415(a) – 5-544.01] Longevity is included in retirement annuity calculations beginning with the January 2001 payment. For the purpose of determining eligibility for inclusion of longevity pay in the calculation of both Federal and District benefit payments, "active service" includes satisfactory police service and all other creditable service (e.g., military service and purchased civilian Government service accrued before retirement). For example, a member who has five years of creditable military service before joining the MPD, and who has 20 years of MPF service, has 25 years of active service. The member will have longevity pay included in his or her average pay for the member's Federal and District benefit payment if he or she has at least 15 years of continuous service with the MPD. Members who retired before August 29, 1972, are ineligible for inclusion of longevity pay in the calculation of Federal and District benefit payments.	2912
330	Benefits Calculations	Service Purchases	Annuity Payments	POLFF	Annuity payments are exempt from Social Security and social security offset, provided that any purchased service was purchased by the operable deadlines.	2918
331	Benefits Calculations	Service Purchases	Military Service	POLFF	(a) For employees who entered on duty on or before June 30, 1997, and whose military service was performed prior to that date, credit for military service is included in Federal Benefit Payments under the terms and conditions applicable to each plan. (b) For employees who enter on duty after June 30, 1997, military service is not creditable toward Federal Benefit Payments, even if performed as of June 30, 1997. (c) For employees who entered on duty on or before June 30, 1997, but who perform military service after that date, the credit for military service is not included in Federal Benefit Payments.	3038
332	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Teachers	The Plan provides for two kinds of survivor benefits: a monthly survivor payment to qualified survivors and a one time lump sum payment to beneficiaries.	1336

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333	Benefits Calculations	Survivors, QDRO	Installment Survivor Benefits	Teachers	If an active teacher dies after completing 18 months of eligible service and is survived by a spouse, eligible child or dependent parent, the teacher's eligible survivors may be entitled to monthly benefit payments from the plan.	1338
334	Benefits Calculations	Survivors, QDRO	Installment Survivor Benefits	Teachers	Surviving Spouse Only - Surviving spouses are entitled to receive survivor annuity payments when a teacher dies before retiring. To be eligible, the surviving spouse must have been married to the teacher for at least two years immediately before the teacher's death, or must be the natural mother or father of a child by the marriage.	1339
335	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	Under the Unreduced Annuity Option, the full basic retirement annuity is paid upon retirement to the teacher. [31-1226(a)] Under this option, a teacher will receive payments until he or she dies. If a teacher is married and elects this option, the teacher's spouse will not be entitled to a survivor benefit and will not be permitted to continue health benefits coverage after death. Election of the unreduced annuity option is irrevocable as long as the teacher remains married	1351
336	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	As noted above, eligible surviving children will be entitled to survivor benefits even if the unreduced annuity option is chosen.	1354
337	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	2. The Reduced Annuity with a Maximum Survivor Annuity pays retirement benefits to a surviving spouse after the death of the teacher.	1355
338	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	This option is available only to teachers who are married at the time of retirement. This provides a reduced life annuity to the teacher at retirement and the maximum permissible survivor annuity to the teacher's spouse. If this option is elected, the spouse's survivor benefit will equal 55% of the retirement benefit the teacher would have received under the single life option. Under this option, the teacher's life annuity is reduced to provide for the additional payments to the spouse. The reduction will equal the following example calculation: 2.5% of the retirement benefit up to \$3,600, plus 10% of any amount over \$3,600. For example, if a teacher's unreduced annuity equaled \$18,000, it would be reduced by \$1,530: 2.5% of \$ 3,600 = \$ 90.00, plus 10% of \$14,400 = \$ 1,440.00 \$ 1,530	1356
339	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	The Reduced Annuity with a Partial Survivor Annuity also pays retirement benefits to a surviving spouse after death, but in a reduced amount.	1357

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340	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	<p>This option provides a reduced life annuity to the teacher at the time of retirement, and a partial survivor annuity to the teacher's spouse. The partial survivor annuity is any dollar amount or percentage of the annuity the teacher would have received under the single life option that is less than 55% of that amount. The teacher elects the dollar amount or percentage at the time of retirement. The teacher's retirement benefit is reduced to provide for the additional payments to the spouse. This option is calculated as follows:</p> <p>As above, assume the teacher's full basic retirement salary equals \$18,000. The partial survivor annuity will be any dollar amount or percentage that the teacher designates which is less than 55% of 18,000, or \$9,900.</p> <p>Formula for determining annuity reduction for partial survivor annuity:</p> <ol style="list-style-type: none"> 1. Annual Survivor annuity amount / 55% (if percentage is elected, multiply by life annuity to get survivor amount) 2. Take 1st \$3600 of this amount and multiply by 2.5% 3. Take remaining amount over \$3600.00 and multiply by 10% 4. Add amounts in step 2 and 3 to get amount of annual reduction to annuity <p>For example, if a teacher chooses to leave a partial survivor annuity of 50%, the teacher's life annuity would be reduced by \$1,366.00. The spouse's survivor benefit would be 50% of the unreduced annuity, or \$9,000.</p> <ol style="list-style-type: none"> 1. $9000 / 55\% = \\$16363.64$ 2. $2.5\% * 3600 = \\$90.00$ 3. $10\% * (16363.64 - 3600) = \\1276.36 	1358
341	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	<p>If a teacher chooses to leave a partial survivor annuity of 25%, the amount reduced from the teacher's retirement annuity will equal \$548.18, and the survivor's annuity will equal \$4,500 (i.e., 25% of \$18,000).</p> <p>Formula for determining annuity reduction for partial survivor annuity:</p> <ol style="list-style-type: none"> 1. Annual Survivor annuity amount / 55% (if percentage is elected, multiply by life annuity to get survivor annuity amount) 2. Take 1st \$3600 of this amount and multiply by 2.5% 3. Take remaining amount over \$3600.00 and multiply by 10% 4. Add amounts in step 2 and 3 to get amount of annual reduction to annuity 	1359
342	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	Election of the reduced annuity with a partial survivor annuity is irrevocable as long as the teacher remains married.	1360
343	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	If a teacher is married at the time of retirement and elects the reduced annuity with maximum or partial survivor annuity, and subsequently dies survived by a spouse whom the teacher married after retirement, that spouse is entitled to the maximum or partial survivor annuity elected by the teacher, but only if (1) the spouse was married to the teacher for at least two years preceding the teacher's death or was the parent of a child from the marriage; and (2) the surviving spouse elects to receive the survivor annuity instead of any other survivor benefit to which he or she may be entitled under any retirement system for Federal or District employees. This specifically refers to a teacher who, at the time of retirement is married to one person. This marriage ends during his retirement due to death, divorce, annulment, etc. After this marriage ends, the teacher remarries and subsequently dies and is survived by the spouse of the marriage	1361
344	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	<p>Under the maximum survivor and partial survivor annuities, payments to the spouse begin the day after the teacher's death and continue until the last day of the month before the surviving spouse dies or remarried before age 60.</p> <p>Payments may resume on the day the marriage ends because of death, annulment or divorce, provided (1) the spouse elects to receive the terminated survivor annuity instead of a survivor annuity to which the surviving spouse may be entitled under any retirement system for Federal or District employees by reason of the remarriage; and (2) any lump sum paid on termination of the survivor annuity is repaid to the District retirement fund.</p>	1362

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345	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	If a teacher has elected a full or partial survivor annuity and his or her spouse predeceases the teacher, the teacher's life annuity will be increased beginning the day after the spouse's death to the amount it would have been if the teacher had elected the single life option.	1364
346	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	NOTE REGARDING HEALTH BENEFITS: If a teacher elects either the maximum survivor annuity or the partial survivor annuity at the time of retirement, his or her surviving spouse will be entitled to continue health benefits coverage after the teacher's death provided that (1) the teacher elected self and family coverage prior to death; and (2) the survivor continues to make premium payments through deductions from benefit payments and/or by direct payments.	1365
347	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	4. The Reduced Annuity Providing for a Life Insurance Benefit Payable in a Lump Sum Option allows a teacher to reduce his or her life annuity and use the extra money to buy a life insurance policy payable upon the teacher's death.	1366
348	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	The teacher determines the face amount of the life insurance which cannot exceed the teacher's contributions accumulated with interest at the time of retirement.	1367
349	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	If the beneficiary is not alive at the time of the teacher's death, payment will be made in accordance with the order of precedence.	1368
350	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	Election of the reduced annuity providing for a life insurance benefit payable in a lump sum option is irrevocable except that the teacher may convert the value of the life insurance to an additional life annuity of equivalent value on any anniversary of the teacher's retirement date before reaching age 70.	1369
351	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	NOTE REGARDING HEALTH BENEFITS: If a teacher elects the insurance option, his or her survivors are ineligible for continuing health care coverage after the teacher's death.	1370
352	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	3. The Reduced Annuity with a Survivor Annuity to a person with an Insurable Interest Option pays a reduced life annuity to the teacher and a survivor annuity to a person designated in writing by the teacher as having an insurable interest (i.e. someone who would reasonably be expected to depend upon the retired teacher financially had he or she lived).	1372
353	Benefits Calculations	Survivors, QDRO	Post Retirement Survivor Annuities	Teachers	The teacher must select the option. The survivor annuitant receives up to 55% of the teacher's reduced life annuity for life beginning the day after the teacher's death. The teacher's reduced life annuity is calculated as follows: -If the survivor annuitant is older than, the same age as, or no more than five years younger than the teacher: the teacher's reduced life annuity is 90% of the full life annuity. - between five and ten years younger than the teacher: the teacher's reduced life annuity is 85% of the full life annuity. - between ten and fifteen years younger than the teacher: the teacher's reduced life annuity is 80% of the full life annuity. - between fifteen and twenty years younger than the teacher: the teacher's reduced life annuity is 75% of the full life annuity. - between twenty and twenty-five years younger than the teacher: the teacher's reduced life annuity is 70% of the full life annuity. - more than twenty-five years younger than the teacher: the teacher's reduced life annuity is 60% of the full life annuity	1373

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354	Benefits Calculations	Survivors, QDRO	Changing Survivor Elections	Teachers	As noted above, survivor elections normally are irrevocable. However, a teacher who is unmarried at the time of retirement and who later marries may irrevocably elect, in a signed writing filed with DCRB within one year after the teacher marries, either the joint and full survivor option or the joint and partial survivor option. The reduced life annuity resulting from such an election becomes effective on the first day of the month after the election is received by the DCRB. Such an election also voids prospectively any prior election of either an insurance option or an insurable interest survivor's annuity option.	1374
355	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	Lump Sum Benefit: Lump Sum Benefit gets paid out when the annuitant's account is closed and the balance of his account is paid out. The lump sum is not paid out if there are eligible survivors.	1613
356	Benefits Calculations	Survivors, QDRO	INSTALLMENT SURVIVOR BENEFITS	Teachers	The benefit is up to 55% of the amount of an annuity computed under the standard rule (years of service and average salary at time of death). In computing the survivor annuity, the minimum benefit payable to a surviving spouse will be the lesser of : -- 55% of 40% of the teacher's average salary, or -- 55% of the amount a teacher would have earned under the standard formula for computing annuities, with eligible service added from the date of death to the date on which the teacher would have reached age 60.	1617
357	Benefits Calculations	Survivors, QDRO	INSTALLMENT SURVIVOR BENEFITS	Both POLFF and Teachers	Optional Forms of Payment: Insurable interest ends on the election, post- retirement marriage, of a survivor benefit	1618
358	Benefits Calculations	Survivors, QDRO	INSTALLMENT SURVIVOR BENEFITS	Both POLFF and Teachers	Payments to a surviving spouse may resume if the spouse's marriage ends because of death, annulment or divorce if -- the surviving spouse elects to receive the terminated annuity in lieu of a survivor benefit to which he or she may be entitled, under any retirement program for Federal or District employees, by reason of the remarriage; and -- any lump sum paid on termination of the annuity is deposited in the District retirement fund.	1619
359	Benefits Calculations	Survivors, QDRO	INSTALLMENT SURVIVOR BENEFITS	Both POLFF and Teachers	If for some reason the husband or wife is not receiving an annuity, but is still alive, eligible children receive the smaller child annuity.	1621
360	Benefits Calculations	Survivors, QDRO	POST RETIREMENT SURVIVOR ANNUITIES	Both POLFF and Teachers	If both parents are receiving survivor benefits and the one-parent dies leaving the remaining parent as a sole survivor, the annuity must be recalculated.	1625
361	Benefits Calculations	Survivors, QDRO	POST RETIREMENT SURVIVOR ANNUITIES	Teachers	Lump Sum Insurance Option, / POST RETIREMENT SURVIVOR ANNUITIES / Lump Sum Insurance Benefit – Optional Form For Teachers At the time of retirement, a teacher is entitled to elect a lump sum insurance amount that is paid to the beneficiary at the time of death in retirement. On the application form for retirement, the teacher selects this option and indicates a life insurance amount. A one-time reduction of the base annuity amount is calculated using an age factor table.	1629
362	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	The plan provides a benefit for a member's survivors upon death. The benefit is paid automatically whether the member dies before or after retirement.	2659

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363	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	In addition to the options outlined directly below, a member can provide a surviving spouse or eligible child with additional support by electing to reduce his or her benefit upon retirement.	2660
364	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	Payments to a non-disabled child survivor end upon marriage, death, attainment of age 18, or attainment of age 22 if the child is regularly pursuing a full time course of study or training, whichever occurs first. Payments to an unmarried child who is incapable of self-support because of mental or physical disability incurred before age 18 end upon marriage, death, or restoration of capacity for self-support, whichever occurs first.	2661
365	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	If the active member dies in the line of duty and is survived by more than one person entitled to an annuity based upon the service of the deceased member (excluding the member's parent or sibling), each such survivor receives an equal share of the \$50,000 payment. If the member is not survived by such a person (including such a person who did not receive more than one half of his or her support from the deceased member) but is survived by more than one parent or sibling who received more than one half of his or her support from the deceased member, each parent or sibling receives an equal share of the \$50,000 payment.	2662
366	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Your eligible surviving children will receive a regular child survivor annuity effective the day after your death that is paid monthly as long as they remain eligible. The amount of the benefit depends on your marital/domestic partnership status at your death. If you have a surviving spouse, the annual amount of a regular child-survivor benefit is lesser of:	2663
367	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	• 60% of your average base pay, divided by the number of eligible children; or	2665
368	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	• \$4,716* (if you were hired before November 10, 1996) or \$4,440* (if you were hired on or after November 10, 1996); or • \$14,148* (if you were hired before November 10, 1996) or \$13,320* (if you were hired on or after November 10, 1996), divided by the number of eligible children. *These initial annuity amounts apply from March 1, 2022 through March 1, 2023. Initial amounts increase each year based on cost-of-living adjustments	2666
369	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	The annuity to a surviving spouse begins on the first day of the first month during which the member or former member dies.	2667
370	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	For individuals who retired prior to July 1, 1997, payments continue throughout a spouse's lifetime, unless he or she remarries before reaching the age of 60. If the individual retired after July 1, 1997, then the age requirement is 55.	2668
371	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Payments resume if the subsequent marriage ends because of death, annulment, or divorce.	2669
372	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	If a surviving spouse is not entitled to such Social Security benefits based upon the wages and self-employment income of the member at the time of benefit determination, but is entitled to such Social Security benefits at the time he or she reaches Social Security retirement age (age 65 or greater depending upon the individual's birth date), military service will be excluded and the surviving spouse's annuity will be recalculated effective on the first day of the month the surviving spouse reaches Social Security retirement age. Eligibility for Social Security benefits based upon the wages and self-employment income of the surviving spouse do not require the exclusion of military service from the surviving	2670
373	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Surviving Spouse and Eligible Children – Eligible children are those of the member who are unmarried and under 18 years of age (including adopted children, and stepchildren or recognized natural children who live with the member in a regular parent-child relationship).	2671
374	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Unmarried children between the ages of 18 and 22 are eligible if they are full time students. Any unmarried child regardless of age who is incapable of self-support because of a physical or mental disability incurred before age 18 is also an eligible child.	2672
375	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	The annuity to eligible surviving children begins on the first day of the month during which the member dies.	2674

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376	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Payments end when the child reaches age 18, marries, or dies, whichever occurs first. If the child is a full time student, payments will stop at age 22 or when he or she dies, marries, or is no longer in school full time, whichever occurs first.	2675
377	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	A student child whose 22nd birthday occurs on or after July 1 of a calendar year is deemed to have become 22 years of age on July 30 of the year following the student child's 22nd birthday.	2676
378	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	A child who is incapable of self-support because of a physical or mental disability incurred before age 18 remains eligible for survivor benefits until the child dies, marries or becomes capable of self-support, whichever occurs first.	2677
379	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Surviving Eligible Children Only – If a member or former member has no surviving spouse at the time of death, and it should be noted that divorce creates a scenario where there is no surviving spouse, the annual benefit to eligible surviving children will be: - 75% of the member's average pay at the time of death, divided by the number of eligible children. If a member dies after retirement, the average pay is adjusted for cost-of-living increases based on the Consumer Price Index, divided by the number of eligible children.	2678
380	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	A member can elect to reduce the amount of his or her annuity received each month so that an additional annuity to a surviving spouse or eligible child will be paid after death.	2679
381	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	If the elected beneficiary predeceases the member, the full retirement benefit will be restored.	2680
382	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	Election of an additional survivor benefit must be made at the time of retirement if the member retires under optional or disability retirement. A former member entitled to a deferred annuity must make the election at the time the deferred annuity commences.	2681
383	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	This optional annuity will be paid in addition to the automatic survivor benefits. The member must elect this option in writing, and must designate a beneficiary, who can only be a surviving spouse or any one of the member's eligible children.	2682
384	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	If a member elects this option, his or her retirement annuity will be reduced by 10%.	2683
385	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Upon death, the amount by which the member's retirement annuity was reduced will be added to the designated survivor's benefit.	2684
386	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	The additional annuity payable to the designated survivor will be reduced by 5% for each full five years the survivor's age is less than the member's age. The total reduction will not exceed 40% of the original benefit amount.	2685
387	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	The additional survivor's annuity terminates at the same time as the standard survivor's annuity and is subject to all other conditions applicable to the standard survivor annuity.	2686
388	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	Survivors will be entitled to continue health benefits coverage after the member's death provided that (1) the member elected self and plus one and family coverage prior to death; and (2) the survivor continues to make premium payments through deductions from benefit payments and/or by direct payments.	2687

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389	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	Pursuant to a qualifying court order issued after March 15, 1989, a former spouse may be awarded all or a portion of the member's retirement benefits, a payment from the member's retirement benefits, or a survivor annuity.	2688
390	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	A qualifying court order states the former spouse's share as a fixed dollar amount, or a percentage or a fraction of an annuity. For the purposes of awarding a survivor annuity, the qualifying court order must also state either the former spouse's entitlement to a survivor annuity or direct the member or retired officer or member to provide a survivor annuity.	2689
391	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Lump Sum Benefit: \$50,000 additional benefit for death in the line of duty **Not self-inflicted or due to misconduct **Not due to intoxication **Only spouse, sibling, parent or child eligible **Payable in order of precedence Effective Date: Start of Plan, Group: All eligible	2832
392	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	DC Law 13-172 provided for a change in level of benefit under the Police/Fire Plan for survivors of members who died in the line of duty. Any spouse whose commencement date is after 12/29/93 is entitled to 100 percent of the member's Final Salary. No children dependents associated with such spouse are entitled to an annuity under this law. This law does not impact orphans.	2834
393	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Death benefits are payable upon the death of an employee or retired employee. Death benefits are either monthly annuity payments to eligible survivors or, if there are no survivors who are eligible for monthly annuity payments, a one-time lump-sum payment of the retirement contributions which were not paid out.	2836
394	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Children without Surviving Spouse./[4-622(c)(2)] * 75% of FAE/ # of children If a member dies after retirement, the average pay is adjusted for cost-of-living increases based on the Consumer Price Index, divided by the number of eligible children	2839
395	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	US Treasury agreed that the Grade 1, Step 6 including all occupational pays effective at time of death should be used.	2844
396	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Under D.C. Code § 4-622(b)(2), the minimum survivor annuity is 40% of the >corresponding salary for step 6/class 1 of the salary schedule currently in >effect at the time of the retiree's death. This means that the current >salary for the deceased officer's position must be determined including all >applicable retention allowances and current occupational pay for the >position held by the officer immediately prior to retirement	2845
397	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	When a surviving spouse dies and leaves surviving children as orphans, the examiners will be required to re-adjudicate the case to calculate a new annuity amount based on the regulations. This event may also impact the necessity to elect medical coverage benefits.	2850
398	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Both Children of the Marriage at the time of death and Children of a Former Marriage qualify as eligible children.	2851
399	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	When the member passes and there is a surviving spouse and children, the children can receive an annuity concurrently with the Surviving Spouse.	2852

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400	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Surviving Eligible Children Only – If a member or former member has no surviving spouse at the time of death, the annual benefit to eligible surviving children will be: - 75% of the member's average pay at the time of death, divided by the number of eligible children. If a member dies after retirement, the average pay is adjusted for cost-of-living increases based on the Consumer Price Index, divided by the number of eligible children.	2857
401	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Orphans: When the Child of the Widow becomes an orphan, that child will receive 75% of the Deceased Employee's FAE/# of Children.	2858
402	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Spouse Elective Coverage./[4-622(f)] (Should be PeopleSoft Pop-Up functionality) * Reduced by 5% for each full 5yrs. the spouse is younger than the member, reduction not to exceed 40%.	2860
403	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	If an individual is enrolled for self and family health benefits coverage under the Federal Employees Health Benefits Program at the time of the marriage, the new spouse is automatically covered by that enrollment, unless he or she is covered by his or her own enrollment in the Federal Employees Health Benefits Program. A husband and wife may be covered under individual self only enrollments if either or both have a self and family enrollment. A self and family enrollment covers all eligible family members and dual coverage is illegal.	2862
404	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	Eligible children of a prior marriage (and former spouse) would receive the child rate (based on the recent DC Law 14-028), while children of the surviving spouse would not be paid as long as the surviving spouse is receiving the 100% benefit (per the earlier DC Law 13-172).	2864
405	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	In cases involving a disability or early voluntary retiree who dies before reaching the age at which a Federal/District Benefit Payment is payable, the survivor's Federal portion of the Benefit Payment is calculated as though the employee had not retired from service, but had separated from service with eligibility to receive a deferred annuity. (See examples 13G and 13H - Reqs. 119,120). The system will not need to calculate, but DCRB will provide the Federal/District percentages that make up the total payment.	3061
406	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	If the death benefit is not based on the length of service, the portion of a death benefit that is a Federal Benefit Payment is based on the ratio of the number of months of the deceased employee's service as of June 30, 1997, to the number of months of the deceased employee's total service.	3062

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407	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	<p>Death Benefits Example(s) (extract from 31 CFR Part 29)</p> <p>Regardless of whether death occurs in service or after retirement, if the death benefit is not based on the length of service, the portion of a death benefit that is a Federal Benefit Payment is based on the ratio of the number of months of the deceased employee's service as of June 30, 1997, to the number of months of the deceased employee's total service. This proration will always apply to cases of death after retirement in which the survivor annuity is based on the reduction in the employee's annuity to provide the benefit. It also applies to lump-sum benefits and benefits computed under a guaranteed-minimum or a percentage-of-disability-at-retirement formula.</p> <p>This proration will always apply to cases of death after retirement in which the survivor annuity is based on the reduction in the employee's annuity to provide the benefit. It also applies to lump-sum benefits and benefits computed under a guaranteed-minimum or a percentage-of-disability-at-retirement formula.</p>	3063
408	Benefits Calculations	Survivors, QDRO	Survivor Benefit	POLFF	<p>Information about this death benefit was provided in the original functional requirements and supporting documentation. The system is to be designed and configured to record, authorize and track the payment(s) of the death benefit.</p> <p>The examples below are from the Federal/District liabilities (regulations at 31 CFR Part 29) impact a death payment. Although the discussions are directed primarily at teacher computation examples, the principle applies to the Police Retirement Plan \$50,000. Lump Sum Death Benefit.</p> <p>EXAMPLE: If the individual covered by the Police Plan is hired on April 1, 1968 and dies in the line of duty on April 1, 1998, he/she has 30 years of service. The Federal Benefit Payment is 97½ percent (351 months/360 months) of the \$50,000 Lump Sum Benefit payable. The 97½ percent figure will be provided by DCRB.</p> <p>The Federal Benefit Payment is at the gross amount payable, regardless of the number of beneficiaries that may be entitled to a share of the \$50,000 Lump Sum Benefit payable.</p>	3065
409	Benefits Calculations	Survivors, QDRO	Survivor Benefit	Both POLFF and Teachers	CFR 29.344, the Special Rule Regarding Certain Death Benefits, applies to both the Police and Fire Fighter \$50,000 Lump Sum and the Teacher Lump Sum Life Insurance payments.	3066
410	Benefits Calculations	Survivors, QDRO	REDUCTION FOR SURVIVOR BENEFITS	Both POLFF and Teachers	If a retiree elects a reduction for a survivor annuity, the ratio of the unreduced Federal Benefit Payment to the unreduced total annuity is multiplied by the reduced total annuity to determine the reduced Federal Benefit Payment. (see example 10 - see Reqs. 115,116)	3071

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411	Benefits Calculations	Survivors, QDRO	REDUCTION TO PROVIDE A SURVIVOR ANNUITY EXAMPLES	Both POLFF and Teachers	<p>Example 10: Survivor Reduction Calculations</p> <p>Both of the following examples involve a former teacher who elected a reduced annuity to provide a survivor benefit:</p> <p>Example 10A</p> <p>A. In this example, the employee elects to provide full survivor benefits of 55% of the employee's unreduced annuity. The total annuity is reduced by 2 1/2 percent of the first \$3600 and 10 percent of the balance. The reduced Federal Benefit Payment is determined by multiplying the reduced total annuity (rounded) by the ratio of the unreduced Federal Benefit Payment to the unreduced total annuity. Military service occurred prior to June 30, 1997 and purchase of other service was completed prior to June 30, 1997.</p> <p>Example 10A.—Teachers Optional W/Survivor Reduction [Pre-96 hire]</p> <hr/> <p>Total Annuity Computation</p> <hr/> <p>Birth date: 11/01/42 Hire date: 11/01/68 Separation date: 12/31/97 Department service: 29/02/00 Other service: 03/09/18 Military: 00/09/11 .015 service: 5 .0175 service: 5 .02 service: 23.666667 Average salary: \$66,785.00 Total unreduced: \$42,464.13 Total unreduced/month: \$3,539.00 Reduction: \$3,976.41</p>	3087

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412	Benefits Calculations	Survivors, QDRO	REDUCTION TO PROVIDE A SURVIVOR ANNUITY EXAMPLES	Both POLFF and Teachers	<p>Example 10B</p> <p>B. In this example, the employee elects to provide a partial survivor annuity of 26% of the employee's unreduced annuity. The total annuity is reduced by 2 ½ percent of the first \$3,600 of \$20,073.95 and 10 percent of the balance. The reduced Federal Benefit Payment is determined by multiplying the reduced total annuity (rounded) by the ratio of the unreduced Federal Benefit Payment to the unreduced total annuity.</p> <p>Example 10B.—Teachers Optional W/Survivor Reduction [Pre-96 hire]</p> <hr/> <p>Total Annuity Computation</p> <hr/> <p>Birth date: 11/01/42 Hire date: 11/01/68 Separation date: 12/31/97 Department service: 29/02/00 Other service: 03/09/18 Military: 00/09/11 .015 service: 5 .0175 service: 5 .02 service: 23.666667 Average salary: \$66,785.00 Total unreduced: \$42,464.13 Total unreduced/month: \$3,539.00 Reduction: \$1,737.40 Total reduced: \$40,726.73 Total reduced/month: \$3,394.00</p> <hr/> <p>Federal Benefit Payment Computation</p> <hr/>	3088
413	Benefits Calculations	Survivors, QDRO	Service Data Page	Both POLFF and Teachers	In the case of a survivor, the retirees service data will be displayed	3161
414	Case Management	Claims Management	Benefits For Former Spouses	Teachers	Payment under this section bars recovery by any other person. Normally, a former spouse is not entitled to retirement benefits, including a survivor annuity. However, under certain circumstances, a former spouse may be awarded all or a portion of the teacher's retirement benefits, a payment from the retirement benefits, or a survivor annuity pursuant to a qualifying court order issued after March 15, 1989. A qualifying court order is one that by its terms states the former spouse's share as a fixed dollar amount, or a percentage or a fraction of an annuity, and must state whether the former spouse should receive payment directly from the DC Retirement Board. For the purposes of awarding a survivor annuity, the qualifying court order must also state either the former spouse's entitlement to a survivor annuity or direct the teacher or retired teacher to provide a survivor annuity.	1380
415	Case Management	Claims Management	Benefits For Former Spouses	Teachers	A qualifying court order that is issued before retirement is enforceable. A qualifying court order issued after a teacher's retirement is enforceable only to the extent that it is consistent with any election previously executed at the time of retirement by the teacher regarding the former spouse. For example, where a teacher is married at the time of retirement, has elected a survivor annuity, and subsequently is divorced, a qualifying court order to continue the survivor annuity for the former spouse is enforceable. If the teacher was married at the time of retirement and did not elect a survivor annuity, a subsequent qualifying court order to provide a survivor annuity to the former spouse is not enforceable.	1381

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416	Case Management	Claims Management	Benefits For Former Spouses	Teachers	To the extent such an order awards benefits to a former spouse, any beneficiary who otherwise would have received the amounts will not receive them. If a former spouse remarries before reaching the age of 55, any survivor annuity payments under a qualifying court order shall cease, as will reductions in the retiree's annuity to provide for the survivor annuity.	1382
417	Case Management	Claims Management	Claiming Benefits- If A Claim Is Denied	Both POLFF and Teachers	When all or part of a claim is denied, the District will notify the claimant in writing.	1385
418	Case Management	Claims Management	Claiming Benefits- If A Claim Is Denied	Both POLFF and Teachers	The notice must advise the claimant of the right to request reconsideration of the denial and the time limits for doing so. All requests for reconsideration must be submitted in writing and contain the claimant's name, address, date of birth, claim number (if applicable), and must state the basis for the request.	1386
419	Case Management	Claims Management	Claiming Benefits- If A Claim Is Denied	Both POLFF and Teachers	The DCRB must receive a request for reconsideration within 60 calendar days from the date of the written notice of the initial benefit determination.	1387
420	Case Management	Claims Management	Other Requirements	Teachers	A n annuitant may decline to accept all or part of an annuity if a waiver is filed with the Agency. The waiver may be revoked at any time, but no payment is made for the period the waiver was in effect.	1395
421	Case Management	Claims Management	Other Requirements	POLFF	Periods of Suspension, while a retiree was active, cannot be used in the computation of FAE. The FAE program is currently including periods of Suspension as creditable earnings, when computing a retiree's FAE instead of processing the period of Suspension as not creditable.	1405
422	Case Management	Claims Management	Other Requirements	POLFF	As a POLFF, if you retire or resign from the police force during an ongoing disciplinary investigation or allegations of serious misconduct, you will be considered in "conditional retirement" until the disciplinary investigation is completed and factual findings are made. While in conditional retirement, you will not be paid a retirement benefit or receive other accrued leave, while the disciplinary investigation is pending.	1406
423	Case Management	Claims Management	Other Requirements	Teachers	According to the Teachers Summary Plan Document, Dependent Parents can be counted as survivors when a retiree dies.	1410
424	Case Management	Claims Management	Claiming Benefits	Both POLFF and Teachers	If both spouses are receiving retirement benefits and the one-parent dies leaving the remaining parent as a sole survivor, the annuity must be recalculated. This may also impact the necessity to elect medical coverage benefits. (DC Teachers, Fire & Police Only).	2871
425	Case Management	Claims Management	Claiming Benefits	Both POLFF and Teachers	The statement to the retiree must provide the following: - The citation of the law under which they retired. - The Percentage Ratio - The Date of Retirement/Commencement Date - Title 4, Sections 507 and 508 applies to former members who retired in the line of duty before August 21, 1957 - Title 4, DC Code (1981 edition), Section 616(e) applies to Metropolitan Police and Fire who retire in the line of duty and hired after 2/14/80. Rev. 4/20/01 - Title 4, DC Code (1981 edition), Section 616(a) applies to Metropolitan Police and Fire who retired in the line of duty and hired before 2/15/80. Rev. 4/20/01	2882
426	Case Management	Claims Management	Benefits Processing	Both POLFF and Teachers	Benefits Processing: The system enables Benefits Processing by Establishing new retirements annually	3169

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427	Case Management	Claims Management	Benefits Processing	Both POLFF and Teachers	Benefits Processing: The system enables Benefits Processing by Processing requests for disability retirements, death benefits, and survivor benefits	3170
428	Case Management	Claims Management	Benefits Processing	Both POLFF and Teachers	Benefits Processing: The system enables Benefits Processing by Processing withdrawals, transfers, and other membership terminations	3171
429	Case Management	Claims Management	Benefits Processing	Both POLFF and Teachers	Benefits Processing: The system enables Benefits Processing by Calculating and processing member purchase of service agreements	3172
430	Case Management	Claims Management	Benefits Processing	Both POLFF and Teachers	Benefits Processing: The system enables Benefits Processing by Determines eligibility and enrollments	3173
431	Case Management	Death Processing	Death Benefits	Both POLFF and Teachers	The annuity must be payable for at least one day in the month of retirement [i.e., annuity must be due and payable for the 31st in the case of a 31 day month, the 30th in the case of a 30 day month, or 28th (or 29th in a leap year) for retirement in February].	1491
432	Case Management	Death Processing	Death Benefits	Both POLFF and Teachers	Death Benefits are payable upon the death of an employee or retired employee. Death benefits are either monthly annuity payments to eligible survivors or a one time lump sum payment of the retirement contributions which were not paid out.	1497
433	Case Management	Death Processing	Contingency	Both POLFF and Teachers	If for some reason the husband or wife is not receiving an annuity, but is still alive, eligible children receive the smaller child annuity. For example, a teacher has three children by a previous marriage and dies before he has been married for two years to or has had children with his second wife. The three children would receive the smaller annuity, and the wife receives no annuity.	1501
434	Case Management	Death Processing	Post Adjudication	Both POLFF and Teachers	If both parents are receiving survivor benefits and the one-parent dies leaving the remaining parent as a sole survivor, the annuity must be recalculated (SEE NOTE) Note: D.C. Code § 31-1231(b)(3) (1997) provides that when the teacher dies and is not survived by a widow, widower, or children, then the dependent father and/or mother is entitled to an annuity. The total annuity is to be paid jointly to the surviving dependent parents, and the annuity is to continue after the death of either parent. Because there is only one annuity to be paid to the dependent parents together, there is no reason to recalculate the annuity when one parent dies; the surviving parent would simply receive the annuity individually.	1504
435	Case Management	Death Processing	Post Adjudication	Teachers	Instead of the unreduced annuity option, a teacher can elect one of the following methods for payment upon retirement: PAYMENT METHOD OPTIONS FOR TEACHERS WHO ARE NOT MARRIED AT THE TIME OF RETIREMENT 2. The Reduced Annuity Providing for a Life Insurance Benefit Payable in a Lump Sum Option. Election of the Reduced annuity with Survivor annuity to a person with an Insurable Interest option is irrevocable, except as stated below:	1505
436	Case Management	Death Processing	Just_Reqs_Equal	Teachers	If the former spouse gets a percent, increase the former spouse's amount every time the retiree amount increases.	1518

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437	Case Management	Death Processing	DC OPRS Letter	Both POLFF and Teachers	The current system automatically calculates the prorated annuity at one rate. The new system must automatically calculate the accrued annuity amounts based on the commencement date of the annuity.	1522
438	Case Management	Death Processing	IssueDB	Both POLFF and Teachers	Taxes will be withheld only for MD, DC, and VA. The District does not have the necessary reciprocal agreements with any other states to withhold state taxes on retirement payments.	1524
439	Case Management	Death Processing	General Requirement - Blues Only	Both POLFF and Teachers	Unused Sick Leave fractional days currently are included in the Unused SL calculation Example: A real example follows: Individual has 426 hours over 2080 hours (hours in a year). The 426 hours is divided by 8 and the result is 52.50. The examiner drops the .50.	1531
440	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	Both POLFF and Teachers	<p>Example 13: Death Benefits Calculation</p> <p>Examples A and B involve service-based death benefits calculations. Examples C – F involve non-service-based death benefits calculations. Examples G and H involve disability death benefit calculations.</p> <p>Example 13A: A. In this example, an individual covered by the Teachers Plan retires in December 1997 and elects to provide a full survivor annuity. He dies in June 1998. The survivor's Federal Benefit Payment is 98.4 percent (\$3,483 ÷ \$3,539) of the total survivor benefit.</p> <p>Example 13A.--Teachers Death Benefits [Pre-96 hire]</p> <p>----- Total Annuity Computation -----</p> <p>Birth date: 11/01/42 Hire date: 11/01/68 Separation date: 12/31/97 Death date: 06/24/98 Department service: 29/02/00 Other service: 03/09/18 Military: 00/09/11 Average salary: \$ 66,785.00 Total unreduced/month (retiree): \$3,539.00 Total/month (survivor): \$1,946.00</p> <p>----- Federal Benefit Payment Computation -----</p> <p>Birth date: 11/01/42 Hire date: 11/01/68</p>	3091

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441	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	Both POLFF and Teachers	<p>This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. Example 13B: Death Benefits Calculation, Teacher employee. In this example, a teacher dies in service on June 30, 1998 after 31 years of departmental service. Since the survivor annuity is based on actual service, the Federal Benefit Payment is based on the 30 years of service as of June 30, 1997. The total benefit is based on the 31 years of total service. No proration is appropriate.</p> <p>Annuitant Information: Birth date: 07/01/39 Hire date: 07/01/67 Average salary: \$38,787.88 Total Annuity Computation: Separation date: 06/30/98 Death date: 06/30/98 Department service: 31/00/00 Annual Benefit: \$12,426.67 Monthly Benefit: \$1,036.00 Federal Benefit Payment Computation: Freeze date: 06/30/97 Death date: 06/30/98 Department service: 30/00/00 \$12,000.00 \$1,000.00</p>	3092

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442	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	Both POLFF and Teachers	<p>Example 13C: C. In this example, as in Example A, an individual covered by the Teachers Plan retires in December 1997 but elects to provide a survivor annuity of \$12,000. He dies in June 1998. Since the amount of the survivor annuity is not service-based, the Federal Benefit Payment is a prorated portion of the total benefit. Since the teacher had 398 months of service as of the freeze date and 404 months of service, at retirement, the Federal Benefit Payment equals 398/404ths of the total benefit.</p> <p>Example 13C.--Teachers Death Benefits [pre-96 hire]</p> <p>----- Total Annuity Computation -----</p> <p>Birth date: 11/01/42 Hire date: 11/01/68 Separation date: 12/31/97 Death date: 06/24/98 Department service: 29/02/00 Other service: 03/09/18 Military: 00/09/11 Months of service: 404 Total: \$12,000.00 Total/month: \$1,000.00</p> <p>----- Federal Benefit Payment Computation -----</p> <p>Birth date: 11/01/42 Hire date: 11/01/68 Freeze date: 06/30/97 Death date: 06/24/98 Department service: 28/08/00</p>	3093

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443	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	Both POLFF and Teachers	<p>31 CFR Part 29 - Federal Benefit Payments Under Certain District of Columbia Retirement Plans 01/25/2007. This is an example of how DCRB calculates an annuity and the Federal/District ratio. The Federal/District ratio will be provided to vendor. / DEATH BENEFITS EXAMPLE /</p> <p>Example 13D: D. In this example, a teacher dies in service on April 1, 1998 after 14 years and 6 months of departmental service. Since the survivor annuity is based on the guaranteed minimum, the Federal Benefit Payment is a prorated portion of the total benefit. Since the teacher had 165 months of service as of the freeze date and 180 months of service, including unused sick leave, at death, the Federal Benefit Payment equals 165/180ths of the total benefit.</p> <p>Example 13D.--Teachers Death Benefits [pre-96 hire]</p> <p>----- Total Annuity Computation -----</p> <p>Birth date: 04/01/61 Hire date: 10/01/83 Separation date: 04/01/98 Death date: 04/01/98 Department service: 14/06/01 Unused Sick Leave: 00/06/00 Average salary: \$36,000.00 Months of service: 180 Total: \$7,920.00 Total/month: \$660.00</p> <p>----- Federal Benefit Payment Computation -----</p> <p>Birth date: 04/01/61 Hire date: 04/01/83 Freeze date: 06/30/97</p>	3094

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444	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	POLFF	<p>Example 13E: E. In this example, a police officer dies in the line of duty on July 31, 2001 after 18 years of departmental service. Since the survivor annuity is based on pay and not service, the Federal Benefit Payment is a prorated portion of the total benefit calculated according to plan provisions in effect on July 1, 1997.</p> <p>Example 13E.--Police Death Benefits [Pre-96 hire]</p> <hr/> <p>Total Annuity Computation</p> <hr/> <p>Birth date: 07/13/62 Hire date: 08/01/83 Death date: 07/31/2001 Department service: 18/00/00 Average salary: \$54,000.00 Final salary: \$56,000.00 Months of service: 216 Total: \$56,004.00 Total/month: \$4,667.00 Total based on July 1, 1997 provisions: \$21,600.00 Total/month based on July 1, 1997 provisions: \$1,800.00</p> <hr/> <p>Federal Benefit Payment Computation</p> <hr/> <p>Birth date: 07/13/62 Hire date: 08/01/83 Freeze date: 06/30/97 Death date: 07/31/2001 Department service: 13/11/00 Months of service: 167</p>	3095

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445	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	Teachers	<p>Example 13F: Death Benefits Calculation, Teacher, Pre-96 hire.</p> <p>In this example, as in the prior example, a teacher dies in service on April 1, 1998 after 15 years of departmental service. However, in this example, the teacher was age 40 on the hire date. The amount of service used in the survivor annuity calculation equals the amount of service that the teacher would have had if the teacher continued covered employment until age 60. Since the survivor annuity is based on projected service, a form of the guaranteed minimum, the Federal Benefit Payment is a prorated portion of the total benefit. Since the teacher had 171 months of service as of the freeze date and 180 months of service at death, the Federal Benefit Payment equals 171/180ths of the total benefit.</p> <p>Annuitant Information: Birth date: 04/01/43 Hire date: 04/01/83 Average salary: \$36,000.00 Total Annuity Computation: Separation date: 04/01/98 Death date: 04/01/98 Department service: 15/00/01 Departmental Service projected to age 60: 20/00/01 .015 service: 5; .0175 service: 5; .02 service: 10 Months: 180 Annual Benefit: \$7,177.50 Monthly Benefit: \$598.00 Federal Benefit Payment Computation: Freeze date: 06/30/97 Death date: 04/01/98 Department service: 14/03/00 Months: 171 Ratio (171/180): 0.950000 \$6,818.63</p>	3096

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446	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	Fire	<p>Example 13G:</p> <p>G. In this example, a firefighter dies on July 1, 1999 after retiring based on a disability in the line of duty in November 1997. At separation, the firefighter was not eligible for optional retirement but was eligible to receive a deferred retirement at age 55. The survivor annuity is based on the firefighter's adjusted average pay. Had the firefighter separated from service, but not retired, the survivor would be eligible to receive an annuity. Therefore, the survivor's Federal Benefit Payment is a prorated portion of the survivor annuity. Since the firefighter had 217 months of service as of the freeze date and 222 months of service at retirement, the survivor's Federal Benefit Payment equals 217/222nds of the total survivor benefit.</p> <p>Example 13G.—Firefighters Disability/Early Voluntary Death Benefits</p> <p>-----</p> <p>Total Annuity Computation</p> <p>-----</p> <p>Birth date: 08/20/52 Hire date: 05/14/79 Separation date: 11/28/97 Death date: 07/01/99 Department service: 18/06/15 Adjusted average salary: \$ 45,987.00 Months of service: 222 Total: \$18,396.00 Total/month: \$1,533.00</p> <p>-----</p> <p>Federal Benefit Payment Computation</p> <p>-----</p> <p>Birth date: 08/20/52 Hire date: 05/14/79 Freeze date: 06/30/97 Death date: 07/01/99 Department service: 18/01/17</p>	3097

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447	Case Management	Death Processing	DEATH BENEFITS EXAMPLE	Teachers	<p>Example 13H:</p> <p>H. In this example, a teacher dies on August 3, 1999 after retiring based on a disability in April 1998. At separation, the teacher was not eligible for optional retirement but was eligible to receive a deferred retirement at age 62. The survivor annuity is based on a guaranteed minimum. Had she separated from service, but not retired, the survivor would not be eligible to receive an annuity. Therefore, the survivor's Federal Benefit Payment is zero and the survivor annuity is a 100% District Benefit Payment.</p> <p>Example 13H.--Teachers Disability/Early Voluntary Death Benefits</p> <p>-----</p> <p>Total Annuity Computation</p> <p>-----</p> <p>Birth date: 08/01/41 Hire date: 07/01/76 Separation date: 04/30/98 Death date: 08/03/99 Total: \$21,888.00 Total/month: \$1,824.00</p> <p>-----</p> <p>Federal Benefit Payment Computation</p> <p>-----</p> <p>Birth date: 08/01/41 Hire date: 07/01/76 Separation date: 04/30/98 Death date: 08/03/99 Total: \$0.00</p>	3098
448	Case Management	Disability Claims	Disability Retirement	Teachers	DCPS HR may order or direct at any time such medical or other examination as it deems necessary to determine the facts relative to the nature and degree of a teacher's disability. If the teacher fails to appear for examination, benefit payments will be suspended until continuance of the disability is established or the teacher is eligible for a deferred annuity.	1305
449	Case Management	Disability Claims	Disability Retirement	Teachers	Disability retirement becomes effective on the day after active payroll ceases.	1306
450	Case Management	Disability Claims	Disability Retirement	Teachers	Benefits will continue until death or recovery from the disability prior to reaching retirement age.	1307
451	Case Management	Disability Claims	Disability Retirement	Teachers	A teacher who is retired for disability and who has not reached the minimum age for voluntary retirement for a teacher with his or her years of total service is restricted in the amount that he or she can earn while on disability retirement. If such a teacher earns income from wages and self-employment in a calendar year in an amount that is at least 80% of the current rate of pay of the position occupied by the teacher before retirement, the teacher's annuity ends on January 1 of the first calendar year after such calendar year (not including the calendar year in which the teacher retired for disability).	1308
452	Case Management	Disability Claims	Disability Retirement	Teachers	Disability retirement will be restored, at the rate that would have been in effect but for the termination, effective January 1 of any year following a calendar year during which the amount of the teacher's income from wages and self-employment is less than 80% of the current rate of pay of the position occupied by the teacher before retirement. Disability retirement can also be restored immediately if DCRB determines that, outside of normal fluctuations of the teacher's income, the teacher's income is reduced on an annual basis to an amount less than 80% of the current rate of pay of the position occupied by the teacher before retirement.	1309

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453	Case Management	Disability Claims	Disability Retirement	Teachers	A teacher whose disability retirement is discontinued for one of the above reasons, and who does not become re-employed by the D.C. public schools, will be considered as having separated from the service for reasons other than retirement, and will be entitled to a deferred annuity at age 62.	1310
454	Case Management	Disability Claims	Disability Benefit	Teachers	If a teacher is eligible for disability retirement, the total retirement benefit will be based on average salary and years of total service at the time the teacher becomes disabled.	1322
455	Case Management	Disability Claims	Disability Benefit	Teachers	The benefit will be calculated the same way as the voluntary retirement benefit, with a minimum benefit equal to the lesser of: - 40% of average salary, or - the benefit a teacher would receive using the average salary received at the time of separation with service projected to age 60.	1323
456	Case Management	Disability Claims	Disability Benefit	POLFF	New POLFF retirees who retire Disabled in the Performance of Duty will be able to have their regular non-taxable portion of the annuity calculated, in addition to the Excludable Income.	1401
457	Case Management	Disability Claims	Highlights Of The Plan	POLFF	If the disability is not service related, the member must have at least 5 years of police or fire service to qualify for a disability pension.	2537
458	Case Management	Disability Claims	Creditable Service	POLFF	Members do not have to make contributions to the District retirement fund to obtain military service credit. Members will not receive credit for any service for which they receive a military pension unless it is for disability incurred during combat or certain other activities in the line of military duty.	2578
459	Case Management	Disability Claims	Other Requirements	POLFF	For members hired on or after February 15, 1980, "disability" means that the member is "unable to perform the full range of duties," defined as "the ability ... to perform all of the essential functions of police work or fire suppression as determined by the established policies and procedures of the Metropolitan Police Department or the Fire and Emergency Medical Services Department.	2701
460	Case Management	Disability Claims	Cost of the Plan	POLFF	Police disability in the line of duty is immediately vested.	2718
461	Case Management	Disability Claims	Claiming Benefits	POLFF	Federa/District Liability\ Benefit Payment: DISABILITY: (if Retire Prior: 7/1/97) **Actual payment Effective Date: Start of Plan, Group: All Eligible	2878
462	Case Management	Disability Claims	Claiming Benefits	POLFF	For members hired on or after February 15, 1980, "disability" means any actual or presumed reduction in or absence of ability to engage in gainful activity which is caused, in whole or in part, by an impairment.	2883
463	Case Management	Health Insurance, Legal, QDRO	Other Requirements	Both POLFF and Teachers	The Benefits Loading program was designed to load new FEHB rates from OPM during Open Season.	1409

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464	Case Management	Health Insurance, Legal, QDRO	QDRO	Both POLFF and Teachers	DC: Capability to deduct a portion of the former spouse's annuity and give it to the retiree as dictated by the QDRO. ODCP: Certain Spouse Equity Orders provide for a portion of the QDRO to be given back to the retiree. OPRS requests the capability to deduct a portion of the former spouse's annuity and give it to the retiree as dictated by the QDRO.	1422
465	Case Management	Survivors, QDRO	Other Requirements	Both POLFF and Teachers	The DCRB Legal Department reviews all QDROS to determine the provisions of the court order and transmits a Notice of Spouse Equity Court Order form and the court order to DCRB Benefits Department for processing. Some QDROS grant a survivor annuity to the former spouse upon the death of the retiree. In many cases under this situation, the former spouse is entitled to 100 percent of the survivor annuity (calculated under the Plan rules). However, a QDRO could grant the former spouse less than 100 percent of the survivor annuity (calculated under the Plan rules). The system must calculate a percentage of the survivor annuity to which the former spouse is entitled.	1666
466	Case Management	Workload and Case Management	Policy	Both POLFF and Teachers	Overpayment recovery and reclamation. This process is needed due to the time lag between a participant's death and notification of that death so that payment can be stopped. In these instances, the overpayment amounts need to be recovered.	2183
467	Case Management	Workload and Case Management	Policy	Both POLFF and Teachers	The notice must advise the claimant of the right to request reconsideration of the denial and the time limits for doing so. All requests for reconsideration must be submitted in writing and contain the claimant's name, address, date of birth, claim number (if applicable), and must state the basis for the request.	2224
468	Case Management	Workload and Case Management	Workflow Automation	Both POLFF and Teachers	Case Management and Workflow Automation: Intelligent case routing, task tracking, SLAs, and escalation protocols for retirement, disability, death, and QDRO processing.	3184
469	Case Management	Workload and Case Management	Case and Workflow Management	Both POLFF and Teachers	Case and Workflow Management: The system must include case-centric processing with dynamic routing and workflow support for common pension scenarios, namely Retirement application intake.	3204
470	Case Management	Workload and Case Management	Case and Workflow Management	Both POLFF and Teachers	Case and Workflow Management: The system must include case-centric processing with dynamic routing and workflow support for common pension scenarios, namely Member death notifications.	3206
471	Case Management	Workload and Case Management	Case and Workflow Management	Both POLFF and Teachers	Case and Workflow Management: The system must include case-centric processing with dynamic routing and workflow support for common pension scenarios, namely Service credit inquiries and updates.	3207
472	Case Management	Workload and Case Management	Case and Workflow Management	Both POLFF and Teachers	Case and Workflow Management: Role-based routing and task queues.	3208
473	Case Management	Workload and Case Management	Case and Workflow Management	Both POLFF and Teachers	Case and Workflow Management: Workflow escalation and time-based SLAs.	3209
474	Case Management	Workload and Case Management	Case and Workflow Management	Both POLFF and Teachers	Case and Workflow Management: Real-time dashboards for case aging and throughput.	3210
475	Case Management	Workload and Case Management	Case and Workflow Management	Both POLFF and Teachers	Case and Workflow Management: Full audit trail of case actions and communications.	3211

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476	Case Management	Workload and Case Management	Workflow Assignments	Both POLFF and Teachers	The system will include an integrated electronic workflow engine to define, assign, and escalate business processes.	3314
477	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	On the Final Average Earnings page, Final Average Earnings will be displayed with the label "Average Salary Amount" for the Teacher's Plan.	2998
478	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	The "Begin Date," "End Date," "Time Factor," and "Salary" fields/columns will be displayed on the Final Average Earnings page.	2999
479	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	Only one "Final Calculation" will be designated on the Protect Calculation page.	3000
480	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	On the Final Average Earnings page, Final Average Earnings will be displayed with the label "Average Salary Amount" for the Teacher's Plan. For the POLFF Plan, the label will change based on Department ID; "High 1 - Metro Pol/Fire Dept" will be used for ID's 02, 03 "High 3 - Metro Pol/Fire Dept" will be used for all other ID's	3001
481	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	Service will be presented in YY/MM/DD format within the Empl Acct Adj and Service Adj tabs of the Employee Plan Data page.	3002
482	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	The Payee Payment Schedule and Manual Payment Schedule pages will display a Monthly Tab.	3003
483	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	Student Certification information (dates, etc) will be displayed on the Personal History frame of the Personal Profile page. Start and End dates will be displayed all on one line, and Semester designation will be displayed below those fields.	3004
484	Customer Relationship Management	Account Management	Upgrade Req	Both POLFF and Teachers	The Benefit Commencement Date will be displayed on the Personal Data page and will reside on the Biographical Details page in the Payee Name section next to the Effective Date.	3005
485	Customer Relationship Management	Account Management	Customer Relationship Management (CRM)	Both POLFF and Teachers	Customer Relationship Management (CRM): The system must deliver a 360° view of each member or beneficiary, including Contact history, submitted forms, and correspondence.	3212
486	Customer Relationship Management	Account Management	Customer Relationship Management (CRM)	Both POLFF and Teachers	Customer Relationship Management (CRM): The system must deliver a 360° view of each member or beneficiary, including Counseling session records and notes.	3213
487	Customer Relationship Management	Account Management	Customer Relationship Management (CRM)	Both POLFF and Teachers	Customer Relationship Management (CRM): The system must deliver a 360° view of each member or beneficiary, including Secure messaging and appointment scheduling.	3214
488	Customer Relationship Management	Account Management	Customer Relationship Management (CRM)	Both POLFF and Teachers	Customer Relationship Management (CRM): The system must deliver a 360° view of each member or beneficiary, including Service requests and benefit inquiries.	3215

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489	Customer Relationship Management	Account Management	Customer Relationship Management (CRM)	Both POLFF and Teachers	Customer Relationship Management (CRM): The system must deliver a 360° view of each member or beneficiary, including Employer interactions and member plan details.	3216
490	Customer Relationship Management	Account Management	Customer Relationship Management (CRM)	Both POLFF and Teachers	Customer Relationship Management (CRM): The CRM must integrate with DCRB's contact center solution (Amazon Connect) and support customizable case types, statuses, and routing logic..	3217
491	Customer Relationship Management	Account Management	Service Data Page	Both POLFF and Teachers	The system will have Uniformed Services Employment and Reemployment Rights Act (USERRA) indicator if yes or enabled do not remove purchase of service.	3313
492	Customer Relationship Management	Contact Management	Member Services	Both POLFF and Teachers	Member Services: The system enables Member Services by Providing members, employers and other interested parties with information about retirement benefits, eligibility requirements, and applications	3179
493	Customer Relationship Management	Contact Management	Document and Imaging Integration	Both POLFF and Teachers	Document and Imaging Integration: Seamless ingestion of physical and digital records, with links to member cases and audit-ready file trails.	3186
494	Customer Relationship Management	Contact Management	CRM and Contact Management	Both POLFF and Teachers	CRM and Contact Management: Integrated support for secure messaging, call history, appointment scheduling, and member service analytics.	3187
495	Customer Relationship Management	Contact Management	Member and Employer Portals	Both POLFF and Teachers	Member and Employer Portals: Secure, role-based self-service tools for members, retirees, beneficiaries, and employer HR teams	3188
496	Customer Relationship Management	Contact Management	Member and Employer Portals	Both POLFF and Teachers	Member and Employer Portals: Online estimates, form submissions, download of 1099-R and other documents, appointment requests,, and document uploads	3189
497	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals: Role-based web portals must be provided for Members, Retirees, and Employers/HR Partners.	3222
498	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals - Members and Retirees: Access to retirement estimates, service history, and benefit summaries	3223
499	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals - Members and Retirees: Submission of forms and supporting documents	3224
500	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals - Members and Retirees: Case status tracking and communication	3225
501	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals - Members and Retirees: Viewing of payment history, 1099-Rs, and plan updates	3226
502	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals - Employers/HR Partners: Contribution submission and member enrollment.	3227

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503	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals - Employers/HR Partners: Record correction tools (e.g., service breaks, name changes, etc.) along with audit reports, reminders and alerts.	3228
504	Customer Relationship Management	Contact Management	Self-Service Portals	Both POLFF and Teachers	Self-Service Portals - Employers/HR Partners: Secure file upload and document submission	3229
505	Customer Relationship Management	Correspondence Management	Member Services	Both POLFF and Teachers	Member Services: The system enables Member Services by Assisting customers via the Member Services Call Center; over 21,000 calls are handled annually	3180
506	Customer Relationship Management	Correspondence Management	Member Services	Both POLFF and Teachers	Member Services: The system enables Member Services by Producing retirement related publications	3181
507	Payments	Cost of Living Adjustments	Cost Of Living Adjustments	Teachers	Annuities are adjusted once a year to reflect increases in the cost of living, if any. On the first day of each year, the Mayor determines the cost of living increases based upon the percentage change in the Consumer Product Index—Urban Wage Earners and Clerical Workers (CPI-W, US City average, all items) from the previous year.	1330
508	Payments	Cost of Living Adjustments	Cost Of Living Adjustments	Teachers	The determination is based upon the difference between the price index published for December of the preceding year and the price index published for December of the second preceding year. Where the determination indicates a rise in the price index, the increase in the annuity is calculated as follows if the annuity commenced on or before March 1 of the current year: - for each annuity having a commencing date on or before March 1 of the preceding year, the percentage change computed by the Mayor above, adjusted to the nearest one tenth of one percent; or - for an annuity having commenced after March 1 of the preceding year, a pro rata increase equal to: 1/12 of the percentage change in the price index for the preceding year, multiplied by the number of months (but not exceeding 12 months, counting any portion of a month as an entire month) for which the annuity was payable before the effective date of the increase, adjusted to the nearest 1/10th of 1 percent.	1331
509	Payments	Cost of Living Adjustments	Cost Of Living Adjustments	Teachers	Increases for cost of living adjustments apply to all annuity payments except for annuities based upon voluntary contributions.	1332
510	Payments	Cost of Living Adjustments	Cost Of Living Adjustments	Teachers	Cost of living adjustments also apply to benefits paid to survivors. If the annuitant dies before the first COLA becomes effective, the survivor's first COLA is prorated. If the annuitant dies after the first COLA becomes effective, the survivor's first COLA is not prorated.	1333
511	Payments	Cost of Living Adjustments	Cost Of Living Adjustments	Teachers	"The monthly installment of annuity after adjustment shall be fixed at the nearest dollar except that such installment shall after adjustment reflect an increase of at least \$1."	1334
512	Payments	Cost of Living Adjustments	Cost Of Living Adjustments	Teachers	In the case of an annuitant hired on or after 11/10/96, the maximum annual COLA payable to the annuitant or the annuitant's survivor is 3%.	1335
513	Payments	Cost of Living Adjustments	Lump Sum Elig: Termination Of Benefits	Teachers	**Remarriage before age 60 (may be reinstated at same rate as when the survivor annuity previously terminated, without the intervening COLAs. The reinstatement begins on the date the remarriage is dissolved by death, annulment, or divorce)	1340

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514	Payments	Cost of Living Adjustments	Cost of Living Adjustments	POLFF	Configured system to apply a cap of 3 percent CPI Increase per year for POLFF members or members hired on or after November 10, 1996, when calculating Death in Retirement Survivor Annuities. This rule also impacts the application of COLA for both Teachers and POLFF.	1400
515	Payments	Cost of Living Adjustments	Disability Benefit	POLFF	The mass COLA and COLA Catch-up programs need to know whether to apply increases to the non-taxable portion of the annuity by a percentage (Excludable Income), or leave the same fixed amount (Regular Non-Taxable).	1402
516	Payments	Cost of Living Adjustments	Post Adjudication2	Both POLFF and Teachers	Once the child supplies a student certificate there may be a need to run the Cola process for the time period they were suspended.	1490
517	Payments	Cost of Living Adjustments	Cost Of Living Adjustments	Both POLFF and Teachers	DCRB reviews all QDROS to determine the provisions of the court order and transmits a Notice of Spouse Equity Court Order form and the court order to OPRS for processing. Some QDROS grant a survivor annuity to the former spouse upon the death of the retiree. In many cases under this situation, the former spouse is entitled to 100 percent of the survivor annuity (calculated under the Plan rules). However, a QDRO could grant the former spouse less than 100 percent of the survivor annuity (calculated under the Plan rules). The new systems should be able to accommodate and calculate alternative payee shares, along with inclusion of annual updates such as COLAs.	1536
518	Payments	Cost of Living Adjustments	Other Requirements	Both POLFF and Teachers	Should COLA Process be built to handle disproportionate FED/DC COLA rates? COLA rates are the same for federal and district benefits.	1670
519	Payments	Cost of Living Adjustments	Other Requirements	Both POLFF and Teachers	As currently designed the Cola process does not factor ineligible time due to a "stopped" payment status nor will the process allow the user to run the before Colas then take the result and continue adding the Colas afterwards.	1671
520	Payments	Cost of Living Adjustments	Other Requirements	Both POLFF and Teachers	As stated by the comments for suspensions, termination, remarriage, etc. the running the COLA process would be at the discretion of the examiner; and in these cases where an annuitant is not eligible for the Cola it would not be applied.	1672
521	Payments	Cost of Living Adjustments	Other Requirements	Both POLFF and Teachers	Increase number of tables from two to four to account for different COLA rates based on hire date. (12/31/79 and before; 1/1/80 and after).	1673
522	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENTS	POLFF	A member's retirement annuity and benefits to survivors may be increased periodically.	2618
523	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENTS	POLFF	If a member retired before February 15, 1980, the member's annuity is increased by the same percentage increase in salary to which he or she would have been entitled if he or she were in the active service. The increase will become effective the month after it is provided to active employees.	2619
524	Payments	Cost of Living Adjustments	Survivor Benefit	POLFF	The child rates for police and firefighters were updated to the lesser of \$4,716, or \$14,148 divided by the number of children - both of which are to receive ongoing COLAs (note the numbers change on March 1st of each year)	2856
525	Payments	Cost of Living Adjustments	Survivor Benefit	Both POLFF and Teachers	Fiscal Year 2002 Budget Support Act of 2001. "Police and Firefighter's Surviving Children Annuity Increase Amendment Act of 2001" **Beginning October 1, 2001, the annuity for a surviving child or student child of a deceased police or firefighter increases from \$1,458 to \$2,918 for the first three eligible children, and from \$4,644 to \$8,754 to be divided by four or more eligible children. The amount divided by four or more eligible children is increased on an annual basis by COLA.	2866

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526	Payments	Cost of Living Adjustments	Survivor Benefit	Both POLFF and Teachers	As of March 1, new child survivors will receive as an initial annuity the amounts described in D.C. Law 14-28, updated by the full March 1, COLA. Child survivors on the roll will continue to receive a prorated first COLA.	2867
527	Payments	Cost of Living Adjustments	Claiming Benefits	POLFF	Children of the Former Spouse: The child rates for police and firefighters were updated to the lesser of \$2,918, or \$8,754 divided by the number of children - both of which are to receive ongoing COLAs	2881
528	Payments	Cost of Living Adjustments	Cost of Living Adjustments	POLFF	Each year, when the new COLA is released, we increase the initial child survivor benefits under the teacher and police/fire plans by the amount of the COLA. Because the March 2005 COLA is 3.4%, our thinking is that the initial child survivor benefits for child survivors subject to the cap who come on the rolls on or after March 1, 2005, should be last year's initial benefits increased by 3.0%, instead of 3.4%.	2989
529	Payments	Cost of Living Adjustments	Convert & Pay	Both POLFF and Teachers	The system shall include an ad-hoc query to return conversion related data such as Employee ID, Employee Record Number, Social Security Number, Name, Business Unit, Date of Conversion, Benefit Commencement Date and Release Number.	2990
530	Payments	Cost of Living Adjustments	Convert & Pay	Both POLFF and Teachers	The System should include an ad-hoc query to identify DC Park Police retirees. (This query is intended to identify DC Park Police eligible for Equalization.)	2991
531	Payments	Cost of Living Adjustments	Convert & Pay	Both POLFF and Teachers	The Personal Data page should show the Release Number and Date of Conversion for annuitants.	2992
532	Payments	Cost of Living Adjustments	Convert & Pay	Both POLFF and Teachers	The first effective dated row on Payment Schedule should display the Date of Conversion instead of the Benefit Commencement Date.	2993
533	Payments	Cost of Living Adjustments	Convert & Pay	Both POLFF and Teachers	The first effective dated row on Additional Pay should display the Date of Conversion instead of the Benefit Commencement Date.	2994
534	Payments	Cost of Living Adjustments	ANNUITY ADJUSTMENTS	Both POLFF and Teachers	For disability cases in which the federal liability does not began until the annuitant reaches deferred retirement age (Kick-In), a prorated COLA will be applied to the Federal Benefit payment on the date of the first COLA after the annuitant reaches deferred retirement age.	3070

Seq.	Function	Sub-Function	Category	Plan	Requirement Description	Index
535	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	Both POLFF and Teachers	<p>Example 14: Application of Cost of Living Adjustments</p> <p>In cases in which the District plan applies the same cost of living adjustment that is provided for the Federal Benefit Payment, the federal percentage is applied to the new total benefit after the adjustment to determine the new Federal Benefit Payment after the adjustment.</p> <p>Example 14A: Example 14A.—Teachers COLA - Retiree [Pre-96 hire]</p> <hr/> <p>Benefit Computation (at retirement)</p> <hr/> <p>Total unreduced: \$42,464.13 Total unreduced/month: \$3,539.00 Total/month: \$3,207.00 Federal unreduced: \$41,796.28 Federal unreduced/month: \$3,483.00 Federal percentage = federal unreduced/month ÷ total unreduced/month: 0.984176</p> <hr/> <p>COLA Computation</p> <hr/> <p>DC and Federal COLA rate 5%: Total COLA: \$160.00 New total/month: \$3,367.00 New federal benefit/month = new total benefit/month</p>	3099
536	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	Teachers	<p>Example 14B.—Teachers COLA – Survivor of Retiree [Pre-96 hire]</p> <hr/> <p>Benefit Computation (at death of retiree whose annuity was based on service – percentage survivor election)</p> <hr/> <p>Total/month: \$2,043.00 Federal percentage (retiree): 0.984176 Federal/month: \$2,011.00</p> <hr/> <p>COLA Computation</p> <hr/> <p>DC and Federal COLA rate 4.5%: Total COLA: \$92.00 New total/month: \$2,135.00 New federal benefit/month = new total benefit/month x federal percentage = \$2,101.00</p>	3100

Seq.	Function	Sub-Function	Category	Plan	Requirement Description	Index
537	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	Teachers	<p>Example 14C.—Teachers COLA – Survivor of Retiree [Pre-96 hire]</p> <hr/> <p>Benefit Computation (at death of retiree – flat amount survivor election)</p> <hr/> <p>Total months of service: 404 Federal months of service: 398 Total/month: \$1,000.00 Federal percentage = federal service ÷ total service: 0.985149 Federal/month: \$985.00</p> <hr/> <p>COLA Computation</p> <hr/> <p>DC and Federal COLA rate 4.5%: Total COLA: \$45.00 New total/month: \$1,045.00 New federal benefit/month = new total benefit/month x federal percentage = \$1,029.00</p> <p>Note: This method also applies to a percentage survivor election by a retiree whose annuity was based on a guaranteed minimum.</p>	3101
538	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	Teachers	<p>Example 14D.—Teachers COLA - Survivor of Employee [Pre-96 hire]</p> <hr/> <p>Benefit Computation (at death-based on service)</p> <hr/> <p>Total/month: \$1,036.00 Federal/month: \$1,000.00 Federal percentage = federal/month ÷ total/month: 0.965251</p> <hr/> <p>COLA Computation</p> <hr/> <p>DC and Federal COLA rate 5%: Total COLA: \$52.00 New total benefit/month: \$1,088.00 New federal benefit/month = new total benefit/month x federal percentage = \$1,050.00</p>	3102

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539	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	Teachers	<p>Example 14E.—Teachers COLA - Survivor of Employee [Pre-96 hire]</p> <hr/> <p>Benefit Computation (at death-guaranteed minimum)</p> <hr/> <p>Total months of service: 180 Federal months of service: 171 Total/month: \$598.00 Federal percentage = federal service ÷ total service: 0.950000 Federal/month: \$568.00</p> <hr/> <p>COLA Computation</p> <hr/> <p>DC and Federal COLA rate 5%: Total COLA: \$30.00 New total/month: \$628.00 New federal benefit/month: = new total benefit/month x federal percentage = \$597.00</p>	3103
540	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	POLFF	<p>Example 14F.—Police COLA – Survivor of Retiree</p> <hr/> <p>Benefit Computation (at death of retiree)</p> <hr/> <p>Total months of service: 240 Federal months of service: 236 Total/month: \$1,614.00 Federal percentage = federal service ÷ total service: 0.983333 Federal/month: \$1,587.00</p> <hr/> <p>COLA Computation</p> <hr/> <p>DC and Federal COLA rate 5%: Total COLA: \$81.00 New total/month: \$1,695.00 New federal benefit/month = new total benefit/month x federal percentage = \$1,667.00</p>	3104

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541	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	POLFF	<p>Example 14G.—Firefighter COLA – Survivor of Employee</p> <p>-----</p> <p>Benefit Computation (at death of employee in the line of duty)</p> <p>-----</p> <p>Total/month: \$4,667.00 Federal/month: \$1,867.00 Federal percentage = federal/month ÷ Total/month: 0.400043</p> <p>-----</p> <p>COLA Computation</p> <p>-----</p> <p>DC and Federal COLA rate 4.5%: Total COLA: \$210.00 New total benefit/month: \$4,877.00 New federal benefit/month = New total benefit/month x federal percentage = \$1,951.00</p>	3105
542	Payments	Cost of Living Adjustments	COST OF LIVING ADJUSTMENT EXAMPLES	Both POLFF and Teachers	<p>In cases in which the District plan applies a different cost of living adjustment than is provided for the Federal Benefit Payment, the Federal Benefit Payment will be unaffected by the new District plan provision. In such a case, a new federal percentage equal to the ratio of the Federal Benefit Payment to the total benefit will be established after the adjustments.</p> <p>Example 14H.—Teachers COLA [Pre-96 hire]</p> <p>-----</p> <p>Benefit Computation (at retirement)</p> <p>-----</p> <p>Total Annuity Computation</p> <p>-----</p> <p>Birth date: 11/04/48 Hire date: 03/01/86 Separation date: 02/28/2013 Department service: 27/00/00</p>	3106
543	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Refund and lump sum payments	1676
544	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide global and individual account level infrastructure to compute, track and collect overpayments, to conduct multiple debt collection options (lump sum payment, lump sum collection from annuity, installment payments, write-off, offset, waiver, etc.)	1677
545	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide global and individual account level infrastructure to compute overpayments.	1678
546	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide global and individual account level infrastructure to track overpayments	1679
547	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide global and individual account level infrastructure to conduct multiple debt collection options (lump sum payment, lump sum collection from annuity, installment payments, write-off, offset, waiver, etc.),	1680

Seq.	Function	Sub-Function	Category	Plan	Requirement Description	Index
548	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide financial controls for, but not limited to, the following operations -	1681
549	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	SF 2812 reporting requirements	1682
550	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Various administrative reimbursements.	1683
551	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Various offset activities.	1684
552	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system will provide monthly annuity statements as well as the system will provide appropriate pension account statements, both on demand and scheduled, for the following: Annuitants, Survivors, and other Annuity recipients (re.QDROs, etc.)	1685
553	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Other annuity recipients (re: QDROs, etc.)	1686
554	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Generate a file for each payroll run to be transmitted to the U.S. Department of Treasury Financial Management Service (FMS), in appropriate ECS or 1166 bulk-file format, for generating either check or EFT payments via Treasury FMS.	1687
555	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide a report(s) for each payroll run that enables the accounting office to record the appropriate accounting entries to be recorded in the financial system. The report(s) should identify the gross payroll amount, withholding/deduction amounts by type of deduction, employer share benefit expenses, and net payroll amount.	1688
556	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide a report to detect overpayments. The report should detect and identify the gross overpayment amount as well as the associated net overpayment amount due to death, recalculation of benefit, or other miscellaneous error.	1689
557	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system shall support data maintenance and reporting on a calendar year basis	1690
558	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Continuing to pay beneficiaries one combined amount.	1691
559	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Discovery and record keeping of overpayments	1692
560	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system will provide full payment history for each beneficiary over the entire life cycle of the system, including historical data to the extent that data is converted from existing systems or otherwise entered into the system.	1693
561	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system will provide the capability for retiree and survivor accounts to have various allotments, including subsidiary accounts (e.g., survivor child, former spouse, etc.) with allotment capability, liens, and garnishments.	1694

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562	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	In every account and subsidiary account, the system will record and track the complete gross to net spread including the data items described in the Data Tables at the end of requirements.	1695
563	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Tax Tracking. The system will have the capability to capture and track the taxable portion of each account holder's annuity from the appropriate personnel or payroll system, or as a backup be able to compute the amount, for the appropriate jurisdiction	1696
564	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Federal Government	1697
565	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	District of Columbia	1698
566	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Virginia	1699
567	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Maryland	1700
568	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Other U.S. States, territories, and local governments	1701
569	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Tax Reporting. The system will have the capability to interface with the appropriate personnel or payroll systems for those systems to produce various types of yearly 1099 statements (including 1099R statements)	1702
570	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The capability to produce 1099s directly and should also report nontaxable distributions to former employees.	1703
571	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system should also report nontaxable distributions to former employees	1704
572	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system should be able to generate records for submission to the payment system in check form.	1705
573	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system should be able to generate records for submission to the payment system in ACH form	1706
574	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Payment Types. The system will determine and provide the ability to make payments as either lump sum benefits; installment benefits	1707
575	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Tax Tracking and Reporting. The system will track the payment amounts and dates for multiple retirement plans administered by the system, provide for electronic payment to the following jurisdictions, and include a backup manual method in case of interface failure	1708
576	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Federal	1709
577	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	All other U.S. States, territories, and local governments	1713

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578	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Mass Mailing. The system will provide the ability to create custom form letters, notices, statements, etc. for a specific purpose, both scheduled and on demand, to create mailings which are	1714
579	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Addressed to persons or selected groups of persons with name and address information in the system	1715
580	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Addressed to other agencies or entities	1716
581	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system will provide reporting facilities that allow management and staff to avoid any outside or manual intervention in the automated process.	1717
582	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Actuarial Reports. The system will be designed to provide appropriate actuarial information to meet the needs of the Secretary's Actuary and the District of Columbia, as defined by these organizations.	1718
583	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Pay Cycle Reports. The system will be designed to provide appropriate pension payment information to: Designated banks; The U.S. Bureau of Public Debt; The District Retirement Board; The District of Columbia; The U.S. Treasury; Other system users as appropriate	1719
584	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	On-Demand Reports. The system will generate defined periodic and on-demand benefit statements for account holders.	1724
585	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system delivers the ability to generate and modify all standard reports.	1725
586	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system delivers the ability to create new reports.	1726
587	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Payment Method Reporting - Global report providing data to show the relative counts and amounts for, but not limited to, the following categories (within a user-specified period of time):	1727
588	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Offset	1728
589	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Check	1729
590	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	ACH (Automated Clearing House)	1730
591	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Payment Source Reporting. Global report providing data to show the source of funds for all payments initiated by the system for, but not limited to, the following categories (within a user-specified period of time):	1731
592	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	U.S. Department of the Treasury	1732

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593	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Statistical Reporting - Global report providing various statistical data for, but not limited to, the following categories (within a user-specified period of time): Participants in Teachers Plan; Police Plan; Firefighter Plan;	1734
594	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Participants based on ad hoc inquiries, regardless of Plan membership	1736
595	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	General Reporting – Global reports providing data for, but not limited to, the following categories:	1737
596	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Various current populations paid by the system with gross to net pay, including any plan contributions for fringe benefits	1738
597	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The system has the ability to provide detail and summary reports for third party payments as part of the payroll process, as well as ad hoc reports.	1739
598	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Default "Exempt from FUT" field to checked.	1742
599	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Default "Earned Income Credit" to Not Applicable.	1743
600	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Default "Use Total Wages for Multi-State Employee" field as unchecked.	1744
601	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Default "Distribution %" field to 100%.	1745
602	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Lock "Partial Allowed" field to unchecked and hide.	1746
603	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Default "Prenotification Req'd" field to unchecked.	1747
604	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Default "Amount Frequency" field to "Monthly".	1748
605	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Minimum and Maximum Exemption Fields).	1749
606	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	There needs to be a report that captures employee's that received COLA/Equalization adjustments	1750
607	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Deductions Allowed	1751
608	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Provide an actuarial report. Two options: 1) Modify existing reports, 2) Create new actuarial report	1752
609	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Payroll summary report	1753

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610	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	File extracts for Disabled and Retired members and beneficiaries	1754
611	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	File Extracts for Term Vested members	1755
612	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Process garnishments, wage attachments, and overpayments	1756
613	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Process gross-to-net functionality	1757
614	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Generate 1099R gross wages reporting	1758
615	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Annuitant Gross Benefit Worksheet	1759
616	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Excludable Income Letter	1760
617	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	COLA Participation Letter	1761
618	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	QDRO Participation Letter	1762
619	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Employee POS Letter	1763
620	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Annuitnat Status Letter - Annuitant Death	1764
621	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Audit Report	1765
622	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Deduction Register	1766
623	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Payroll Register	1767
624	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Earnings Statement (Check Print)	1768
625	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Other Earnings Register	1769
626	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Paysheet Record Audit Prior to Calc Pay Report	1770

Seq.	Function	Sub-Function	Category	Plan	Requirement Description	Index
627	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Tax Deposit Summary Report	1771
628	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Quarterly Federal Tax Summary Report	1772
629	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Quarterly State Tax Summary Report	1773
630	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Local Tax Depository Summary Report	1774
631	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Tax Summary Report	1775
632	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Semi-annual Headcount Report	1776
633	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Actuarial Evaluation Extract (PASAV01) ®	1777
634	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Annuitant Status Letter – Underpayment/ Overpayment (F)	1778
635	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Retirement Letter – Teachers, Police, and Fire	1779
636	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Pension Plan Summary (PAT07) (R)	1780
637	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Calculation worksheet	1781
638	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	System Activity Summary for Treasury chargebacks (R)	1782
639	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Active Pensioner Pay Raise Listing – Equalization/ COLA	1783
640	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Active Spouse Payraise Listing - Equalization/COLA	1784
641	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Student Certification/Former Spouse Status Report	1785
642	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Optional B/C No Reduction Notice Listing	1786
643	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Option B/C – No Reduction Letter	1787

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644	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	SSA extract	1788
645	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	PBI extract	1789
646	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Actuarial Extract	1790
647	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Military Tickler Form Letter	1791
648	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Participant Count	1792
649	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	USF G/L Distribution Summary Report	1793
650	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Payroll Check Register	1794
651	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Deductions in Arrears Report	1795
652	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Deductions Not Taken Report	1796
653	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Paysheets Report	1797
654	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Employees Not Processed Report	1798
655	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Payroll Error Messages Report	1799
656	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Check Reconciliation Process	1800
657	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Paysheets Distributed Earnings Report	1804
658	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Balance Adjustment Audit Report	1805
659	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Presheet Audit	1806
660	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Paysheet Records Audit Prior to Confirm Report	1807

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661	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Open/Close Year End Off-Cycle	1809
662	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Retro Pay Request Summary Report	1810
663	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Retro Pay Summary Report	1811
664	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Retro Pay Terms Calculated	1812
665	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	FEDTAX	1813
666	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Benefit payments start immediately upon retirement.	1815
667	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	You have further inquired about the tax consequences of a refund of retirement contributions that a participant may receive after retirement. If this refund satisfies all of the Plan's benefit liabilities to the participant, then the refund is taxable except for the participant's remaining investment in the contract (i.e., the portion of basis that has not already been returned tax-free). If a participant can receive a refund of retirement contributions pursuant to which annuity payments are received over a different term, then the refund is treated as having been received before the annuity starting date (with the nontaxable portion calculated as described in the preceding paragraph) and the nontaxable portion of subsequent annuity payments is calculated as if the contract were a new annuity contract.	1820
668	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	You should report the gross amount of annuity distributions under the Plan (including any nontaxable portion) in box 1 of Form 1099R. You should report the taxable portion of annuity distributions under the Plan in box 2a of Form 1099R.	1821
669	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	ALL: The District requires modifications to the vanilla software to accommodate: 3. The new system must: h. Generate 1099R gross wages reporting.	1822
670	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	ALL: The District requires modifications to the vanilla software to accommodate: 3. The new system must: g. Provide third party reporting.	1823
671	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	ALL: The District requires modifications to the vanilla software to accommodate: 3. The new system must: c. Overpayments.	1826

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672	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	The non taxable amount equals: Amount to be paid times (Tax Basis/value of all vested benefit) The tax basis is also called the "investment in contract" and includes all "employee" contributions. The denominator is also called the "exclusion ratio", since it is the percentage of the amount to be paid which is tax free.	1827
673	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	Federal Benefit Payments are payable on the first business day of the month following the month in which the benefit accrues.	1828
674	Payments	Payments and Payroll Management	Payroll	Both POLFF and Teachers	There will be some reports that must use PeopleSoft and the Payroll System's data. If no deduction is made, then the Payroll System does not have the information to report it. For example, an annuitant is eligible for Basic Life Insurance coverage where there is no deduction (or premium) taken by the Payroll System. Deductions for those retired before January 1, 1990 and who reach age 65 are not taken. In these cases, the reports required combine information where the annuitants eligible for coverage with no premiums would have to come from PeopleSoft and annuitants with the premium deductions were made from the Payroll System.	1829
675	Payments	Payments and Payroll Management	Claiming Benefits - How Retirement Benefits are Paid	Both POLFF and Teachers	(2) a retired member dies without a survivor entitled to receive an annuity and before the aggregate amount of the annuity paid to the retired member equals the total amount deducted and withheld for retirement from his or her salary as a member; then the total amount deducted for retirement in the former case, or the difference between the total amount deducted and the total amount paid as an annuity in the latter case, is paid in the following order of precedence: - First, to any beneficiary or beneficiaries designated in writing by the member, and filed with and received by the Mayor before the member's death; - then to the children of the member, and descendants of deceased children by representation; - then to the parents of the member or the survivor of them; - then to the duly appointed legal representative of the estate of the member; - finally, to the person entitled to act in such capacity under the laws of the member's domicile, except that if that person is not a natural person, no payment will be made.	2696
676	Payments	Payments and Payroll Management	Multiple Beneficiaries	POLFF	Provide for Multiple Beneficiaries Most children are added to the rolls with a surviving parent. If the surviving parent dies, the children become orphans. The examiner must enter data to recalculate the annuity of the children who become orphans. Minimum Requirement: The new system must allow for the recalculation of the child's annuity as an orphan if a surviving parent dies.	2949
677	Payments	Payments and Payroll Management	Survivor Eligibility	POLFF	The Police and Firefighters Retirement and Relief Board (RRB) is the authority that defines survivor eligibility. The D.C. Pension system will rely on the certification provided by the Board.	2951
678	Payments	Payments and Payroll Management	Lump Sum	POLFF	Lump Sum Benefit: Lump Sum Benefit gets paid out when the annuitant dies without a survivor, the annuitant's account is closed, and the balance of the account is paid out. The Lump Sum Benefit is the difference between the total amount that was paid out to the member or former member and the amount the member or former member contributed to the plan, and will be paid according to the orders of precedence in D.C. code § 5-706 (c) and (d).	2954
679	Payments	Payments and Payroll Management	Survivors Annuity	POLFF	DC Law 13-172 provided for a change in level of benefit under the Police/Fire Plan for survivors of members who died in the line of duty. Any spouse whose commencement date is after 12/29/93 is entitled to 100% of the member's Final Salary as an annuity. No children dependents associated with such spouse are entitled to an annuity under this law. This law does not impact orphans.	2959

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680	Payments	Payments and Payroll Management	Survivors Annuity	POLFF	Eligible children of a prior marriage (and former spouse) would receive the child rate (based on the recent DC Law 14-028), while children of the surviving spouse would not be paid as long as the surviving spouse is receiving the 100% benefit (per the earlier DC Law 13-172) paid to survivors of members who died in the line of duty.	2978
681	Payments	Payments and Payroll Management	SCHEDULE FOR FEDERAL BENEFIT PAYMENTS	Both POLFF and Teachers	Benefit Payments are payable on the first business day of the month following the month in which the benefit accrues.	3023
682	Payments	Payments and Payroll Management	REPRESENTATIVE PAYEES	Both POLFF and Teachers	For Benefits, representative payees will be authorized to the same extent and under the same circumstances as each plan permits for non-Federal Benefit Payments under the plan. (See e.g. section 4-629(b) of the D.C. Code (1997) (applicable to the Police and Fire Fighters Plan).)	3024
683	Payments	Payments and Payroll Management	RETROACTIVE PAYMENT OF ACCRUED ANNUITY EXAMPLE	Both POLFF and Teachers	<p>Example 15: Accrual of Federal Benefit Payment, Teachers, Pre-96 hire</p> <p>The Federal Benefit Payment begins to accrue on the annuity commencing date, regardless of whether the employee is added to the annuity roll in time for the regular payment cycle. If the employee is due a retroactive payment of accrued annuity, the portion of the retroactive payment that would have been Federal Benefit Payment (if it were made in the regular payment cycle) is still Federal Benefit Payment. In this example, a teacher retired effective September 11, 1998. She was added to the retirement rolls on the pay date November 1, 1998 (October 1 to October 31 accrual cycle). Her Federal Benefit Payment is \$3000 per month and her total benefit payment is \$3120 per month. Her initial check is \$5200 because it includes a prorated payment for 20 days (September 11 to September 30). The Federal Benefit Payment is \$5000 of the initial check (\$3000 for the October cycle and \$2000 for the September cycle).</p> <p>Annuitant Information: Birth date: 11/01/42 Hire date: 09/01/66 Average salary: \$62,150.00 Total Annuity Computation: Separation date: 09/10/98 Department service: 32/00/10 .015 service: 5; .0175 service: 5; .02 service: 22 Total: \$37,445.38 Total/month: \$3,120.00 Sept 11-30: \$2,080.00 Oct 1-31: \$3,120.00 Nov 1-30: \$3,120.00 Federal Benefit Payment Computation: Freeze date: 06/30/97 Department service: 30/10/00 .15 service: 5; .0175 service: 5; .02 service: 20.833333 Total: \$35,995.21 Total/month: \$3,000.00 Sept 11-30: \$2,000.00 Oct 1-31: \$3,000.00</p>	3107
684	Payments	Payments and Payroll Management	GENERAL REQUIREMENTS	Both POLFF and Teachers	Users will be able to identify those annuitants who in the following annuitant categories; 100% Federal, 100% District, and both Federal/District liability.	3108

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685	Payments	Payments and Payroll Management	GENERAL REQUIREMENTS	Both POLFF and Teachers	All Police and Fire Fighter Plan \$50,000 Lump Sum and Teacher Plan Lump Sum life insurance payments will be made as On-Cycle payments as follows: Police and Fire Fighter Plan \$50,000 Lump Sum and Teacher Plan Lump Sum life insurance payments will be by Federal/District Service Ratio proportion provided by DCRB	3109
686	Payments	Payments and Payroll Management	GENERAL REQUIREMENTS	Both POLFF and Teachers	A Federa/District liability benefit will be associated to the actual payroll month in which it its payment is recorded. The transaction date will be reported as the actual date the transaction was effective. Example -- Annuitant's BCD is 6/11/05, the 1st payment is issued 8/1/05. Both the District payment and Federal Payment are reported with the August 1st payroll and the transaction date is 8/1/2005.	3110
687	Payments	Payments and Payroll Management	OFF-CYCLE PAYMENT PROCESSING	Both POLFF and Teachers	Off-Cycle Payments are issued to annuitants and recorded in system with the same level of detail as On-Cycle Payments.	3111
688	Payments	Payments and Payroll Management	OFF-CYCLE PAYMENT PROCESSING	Both POLFF and Teachers	All Unexpended Balance and Estate Beneficiary Payments will be made as On-Cycle payments as follows: (a) Unexpended Balance - Apply this Federa/District Contribution Ratio to the Unexpended Balance amount to determined the Federal portion of the Unexpended Balance. Subtract the Federal portion from the total Unexpended Balance to determine the District portion of the Unexpended Balance.	3112
689	Payments	Payments and Payroll Management	OFF-CYCLE PAYMENT PROCESSING	Both POLFF and Teachers	(b) Estate Beneficiary Payments - The payment will be a Federal/District ratio using the retiree's service time.	3113
690	Payments	Payments and Payroll Management	OFF-CYCLE PAYMENT PROCESSING	Both POLFF and Teachers	Off-Cycle Payments (Out-of-System Payments): Off-Cycle Payments for monthly annuity amounts need to have a Federal/District ratio assigned to them. This Federal/District ratio will be determined by DCRB	3114
691	Payments	Payments and Payroll Management	OFF-CYCLE PAYMENT PROCESSING	Both POLFF and Teachers	CHECK REVERSALS: Check reversals for monthly annuity amounts need to have a a Federal/District ratio assigned to them. This Federal/District Ratio is determined by DCRB. The process for handling Check Reversals is as follows: 1. Issue the initial check; 2. Cancel the initial check using a check reversal that processes the amount owed back to the DC and Federal trust funds. If there are check reversals for any amounts other than that of a "regular" monthly annuity check, additional information is needed in order to determine how the a Federal/District ratio will be provided by DCRB.	3115
692	Payments	Payments and Payroll Management	OFF-CYCLE PAYMENT PROCESSING	Both POLFF and Teachers	Balance Adjustments are to be recorded with the same level of detail as on-cycle payments.	3116
693	Payments	Payments and Payroll Management	DEBT COLLECTIONS & BALANCE ADJUSTMENTS	Both POLFF and Teachers	For annuity calculations in which a system error exists there is a pressing business need to issue a payment, that payment will be issued as an Off-Cycle payment and recorded in a subsequent month.	3117
694	Payments	Payments and Payroll Management	DEBT COLLECTIONS & BALANCE ADJUSTMENTS	Both POLFF and Teachers	The Off-Cycle Payment Request Form will be updated to include all identifiers and earnings codes	3118

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695	Payments	Payments and Payroll Management	DEBT COLLECTIONS & BALANCE ADJUSTMENTS	Both POLFF and Teachers	All funds collected according to the proportions of the original disbursement.	3119
696	Payments	Payments and Payroll Management	DEBT COLLECTIONS & BALANCE ADJUSTMENTS	Both POLFF and Teachers	Funds collected after the tax year in which they were disbursed based upon the Federa/District liabilitypercentage which was used in the original disbursement. The types of collections affected include collections from stale dated checks, debt collections and reclamations.	3120
697	Payments	Payments and Payroll Management	DEBT COLLECTIONS & BALANCE ADJUSTMENTS	Both POLFF and Teachers	When debt collected is comprised of multiple payments with more than one Federa/District liability ratio, repayment of the oldest debt is credited first, with collected funds according to the proportions of the original disbursement.	3121
698	Payments	Payments and Payroll Management	DEBT COLLECTIONS & BALANCE ADJUSTMENTS	Both POLFF and Teachers	Adjustments to Gross will be made in the Pensions module if the annuitant's has been calculated in system.	3122
699	Payments	Payments and Payroll Management	FUTURE BENEFIT PAYMENTS	Both POLFF and Teachers	When calculating a future benefit payment for an annuitant who takes a reduction to his or her annuity to provide for a survivor benefit, the percentage obtained by dividing the initial Unreduced Federal benefit payment by the initial Unreduced Total benefit payment shall by used as the Federal/District Ratio.	3127
700	Payments	Payments and Payroll Management	FUTURE BENEFIT PAYMENTS	Both POLFF and Teachers	When processing a future benefit payment for a Teacher spousal survivor whose benefit calculation follows the "service accrual" method, the Federa/District liability ratio will be the same as the retiree when he or she was alive.	3128
701	Payments	Payments and Payroll Management	FUTURE BENEFIT PAYMENTS	Both POLFF and Teachers	When calculating a future benefit payment for a survivor whose benefit calculation follows the "service ratio" method, the Federa/District liabilitys obtained by dividing the retiree's Federal months of service by their Total months of service. This will be determined by DCRB for input in the system.	3129
702	Payments	Payments and Payroll Management	PRORATED PAYMENT AMOUNTS	Both POLFF and Teachers	To determine the Federa/District liability portion of a prorated payment amount multiply the Total prorated payment amount by the Federal Allocation Ratio. This will be determined by DCRB for input in the system.	3130
703	Payments	Payments and Payroll Management	PRORATED PAYMENT AMOUNTS	Both POLFF and Teachers	Retroactive Adjustment - Catch-Up payments for months in which the annuitant was owed a payment but was not yet on the payroll (Prorate Gross for normal annuity payments) follow the same Federa/District liability proportions as normal monthly annuity payments.	3131
704	Payments	Payments and Payroll Management	Payments Processing	Both POLFF and Teachers	Payments Processing: The system enables Payments Processing by Processing monthly pension payroll totaling \$670 Million annually	3174
705	Payments	Payments and Payroll Management	Payments Processing	Both POLFF and Teachers	Payments Processing: The system enables Payments Processing by Processing over 13,700 monthly pension payroll EFT transmissions and over 230 monthly pension payroll checks	3175
706	Payments	Payments and Payroll Management	Payments Processing	Both POLFF and Teachers	Payments Processing: The system enables Payments Processing by Paying over 100 death benefits annually	3176

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707	Payments	Payments and Payroll Management	Payments Processing	Both POLFF and Teachers	Payments Processing: The system enables Payments Processing by Providing federal tax information to members and their beneficiaries	3177
708	Payments	Payments and Payroll Management	Payments Processing	Both POLFF and Teachers	Payments Processing: The system enables Payments Processing by Administering Cost of Living Adjustments and Equalization Pay Adjustments	3178
709	Payments	Tax Deductions	Other Requirements	Both POLFF and Teachers	The system shall calculate the non-taxable portion of the annuity for Teachers and Police & Firefighters.	1397
710	Reports Generation	Audit	Reporting	Both POLFF and Teachers	Currently, the system provides audit reports for specific HRMS, Base Benefits, Pension, and Payroll records. This is the activity to verify that no additional ones are requested.	1429
711	Reports Generation	Audit	Upgrade Req	Both POLFF and Teachers	DCRB users will be given access to the Pre-Sheet Audit Report.	3014
712	Reports Generation	Audit	Upgrade Req	Both POLFF and Teachers	Users will not be given access to the Pre-Calculation Audit functionality.	3015
713	Reports Generation	Audit	Upgrade Req	Both POLFF and Teachers	DCRB users will be given access to the Pay Calculation Audit Report.	3016
714	Reports Generation	Audit	REPORTING	Both POLFF and Teachers	The current file generated for audit will be augmented to incorporate Federal/District Liabilities data.	3135
715	Reports Generation	Knowledge Management	Analytics and Reporting	Both POLFF and Teachers	Analytics and Reporting: Ad hoc and scheduled reports for compliance, operations, and audits	3190
716	Reports Generation	Knowledge Management	Training and Knowledge Transfer Built-In	Both POLFF and Teachers	Training and Knowledge Transfer Built-In: The system has Hands-on admin tools with complete full documentation, and embedded training capabilities to reduce reliance on the vendor post-implementation.	3194
717	Reports Generation	Knowledge Management	Document Management	Both POLFF and Teachers	Document Management and Correspondence: The system must support seamless document management, including Integration with FileNet and Kofax for scanned document ingestion and storage.	3218
718	Reports Generation	Knowledge Management	Document Management	Both POLFF and Teachers	Document Management and Correspondence: The system must support seamless document management, including Automatic linking of documents to cases and member records.	3219
719	Reports Generation	Knowledge Management	Document Management	Both POLFF and Teachers	Document Management and Correspondence: The system must support seamless document management, including Generation of outbound correspondence from configurable templates (e.g., retirement award letters, 1099-Rs, welcome packets).	3220
720	Reports Generation	Knowledge Management	Document Management	Both POLFF and Teachers	Document Management and Correspondence: The system must support seamless document management, including Electronic delivery options (secure email, member portal) and support for traditional print/mail.	3221
721	Reports Generation	Member Dashboards	Analytics and Reporting	Both POLFF and Teachers	Analytics and Reporting: Dashboards for member services, benefit trends, and data quality	3191

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722	Reports Generation	Predictive Analytics	Analytics and Reporting	Both POLFF and Teachers	Analytics and Reporting: Predictive and scenario-based modeling capabilities	3192
723	Reports Generation	Reporting	Upgrade Req	Both POLFF and Teachers	FOMF flat files from the directory load the financial institution data the bank tables and produce a report the Bank Data Reconciliation Report, which lists annuitants who have direct deposit going to a bank no longer in existence.	3021
724	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	They system shall report on an individual-by-individual basis the total amount of District and Federal Benefit Payments that were payable to individuals eligible to receive such Payments between the Effective Date and the Benefit Regulations Adoption Date ("Total District Benefit Amount").	3132
725	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	The Total District Benefit Amount Report will include (by Plan) the employee ID, name, gross to net payment amount, Federal liability, District liability, reason for payment and payment date.	3133
726	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	Reporting on the Federal/District Liabilities is to occur on a monthly basis.	3134
727	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	The following Federal/District Liabilities reports are necessary: (a) Summary Report (by Plan) - to include gross amount, Federal liability and District liability.	3136
728	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	(b) Individual Annuitant Report (by Plan) - employee ID, name, gross to net amounts, Federal liability and District liability.	3137
729	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	(c) On-Cycle Payments Detail Report (by Plan) - to include employee ID, name, gross to net amounts, Federal liability and District liability.	3138
730	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	(d) Off-Cycle Payments Detail Report (by Plan) - to include employee ID, name, gross to net amounts, Federal liability and District liability.	3139
731	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	(e) Check Reversal Detail (by Plan) - to include employee ID, name, gross to net amounts, Federal liability and District liability.	3140
732	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	(f) Balance Adjustments Detail (by Plan) - to include employee ID, name, gross to net amounts, Federal liability and District liability.	3141
733	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	(g) Auto Collections Detail Report (by Plan) - to include employee ID, name, reason for auto collection, total paid and balance due.	3142
734	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	The Off-Cycle Payment Request Form will be updated to provide a compelling business reason for the Off-Cycle payment and include a DCRB initiator and DCRB approver.	3143

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735	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	the payroll provider will notify DCRB of all Auto Collections via the monthly report.	3144
736	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	Manual adjustments to the Payline will only be made for deductions.	3145
737	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	A quality control plan will be developed to support the Federal/District Ratio reporting..	3146
738	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	The following types of payments will be made On-Cycle: Unexpended Balances, Estate/Beneficiary, Police and Fire Fighter \$50,000 Lump Sum, Teacher Lump Sum Insurance and System Supported Recalculations.	3147
739	Reports Generation	Reporting	REPORTING	Both POLFF and Teachers	Adjustments to Gross will be made in the Pensions module if the annuitant's Federal/District ratio has been updated in the system.	3148
740	Reports Generation	Reporting	Federal/District Ratioplit Reimbursement	Both POLFF and Teachers	A field labeled "Other" will be created in the current template to track other payments in the system Activity Section	3162
741	Reports Generation	Reporting	Federal/District Ratio Reimbursement Summary Report	Both POLFF and Teachers	Member information should be created to track manual historic "Adjustments" in the system. History be added after each of the following rows: On-Cycle Payments, Off-Cycle Payments, Check Reversals. In addition history will be added to total the payment with the manual adjustment.	3163
742	Reports Generation	Reporting	Federal/District Ratio Reimbursement Summary Report	Both POLFF and Teachers	The Federal/District Ratio Reimbursement Report Template will be expanded to reflect a Summary Report tab and Data tab for each month of the year.	3164
743	Reports Generation	Reporting	Federal/District Ratio Reimbursement Summary Report	Both POLFF and Teachers	The Federal/District Ratio Reimbursement Report Template will have a new tab to reflect the current years' payments. This tab will sum all of the monthly tabs.	3165
744	Informational	Definitions	Definitions	Teachers	The term "annual salary" means the total annual income received during the fiscal year for service rendered in the public day schools (not including summer schools) of the District of Columbia, including basic salary, automatic increases, and longevity allowances, provided for in the District of Columbia Teachers' Salary Act of 1945, as amended.	1546
745	Informational	Definitions	Pension Statuses	Both POLFF and Teachers	Support for deferred pension statuses: RDF – Retired Deferred Status DDF – Disability Deferred Status BDF – Beneficiary (Survivor) Deferred Status QDF – QDRO (Former Spouse) Deferred These statuses are designed to identify the time period between the benefit commencement date and the actual date of the first check. It is possible to skip these statuses and record the party as being in payment status immediately.	2521
746	Informational	Definitions	Definitions	POLFF	The term "member" means any officer or member of the Metropolitan Police Force, or of the Fire Department of the District of Columbia.	2539

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747	Informational	Definitions	Definitions	POLFF	The terms "disabled" and "disability" mean disabled for useful and efficient service in the grade or class of position last occupied by the member by reason of disease or injury, and unable to perform the full range of duties of a police officer or firefighter. Disability is not due to "vicious habits" or intemperance as determined by the Police and Fire Clinic, or willful misconduct as determined by the Mayor.	2540
748	Informational	Definitions	Definitions	POLFF	The term "surviving spouse" means the surviving husband or wife of a member or former member if: (A) He or she was married to such member or former member: (i) While he or she was a member; or (ii) For at least 1 year immediately preceding his or her death; or (B) He or she is the parent of issue by such marriage.	2541
749	Informational	Definitions	Definitions	POLFF	The term "child" means an unmarried child, including: (i) An adopted child; and (ii) A stepchild or recognized natural child who lives with the member in a regular parent-child relationship, under the age of 18 years; or (iii) Such unmarried child regardless of age who, because of physical or mental disability incurred before the age of 18, is incapable of self-support.	2542
750	Informational	Definitions	Definitions	POLFF	The term "student child" means an unmarried child who is a student between the ages of 18 and 22 years, and who is regularly pursuing a full-time course of study or training in residence in a high school, trade school, technical or vocational institute, junior college, college, university, or comparable recognized educational institution.	2543
751	Informational	Definitions	Definitions	Both POLFF and Teachers	The term "eligible child" means a child or student child.	2544
752	Informational	Definitions	Definitions	POLFF	The term "basic salary" means regular salary established by law or regulation, including any differential for special occupational assignment, but not including overtime, holiday, or military pay. Longevity pay is included if the member has at least 25 years of active service.	2545
753	Informational	Definitions	Definitions	POLFF	The term "military service" means honorable active service in the Army, Navy, Air Force, Marine Corps, or Coast Guard of the United States, but shall not include service in the National Guard except when ordered to active duty in the service of the United States.	2546
754	Informational	Definitions	Definitions	POLFF	The term "Mayor" means the Mayor of the District of Columbia or his designated agent or agents.	2547
755	Informational	Definitions	Definitions	POLFF	The term "government service" means honorable active service in the executive, judicial, or legislative branches of the United States government, including government owned or controlled corporations, and Gallaudet College, and the municipal government of the District of Columbia, and for which retirement deductions, other than social security deductions, were made.	2548

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756	Informational	Definitions	Definitions	POLFF	The term "average pay" means the highest annual rate resulting from averaging the member's rates of basic salary in effect over any 36 consecutive months of police or fire service in the case of a member who first becomes a member on or after February 15, 1980, or over any 12 consecutive months of police or fire service in the case of any other member, with each rate weighted by the time it was in effect, except that if the member retires under disability retirement for	2549
757	Informational	Definitions	Definitions	POLFF	The term "adjusted average pay" means the average pay of a retired member increased by the percentage increase (adjusted to the nearest one tenth of 1%) in the Consumer Price Index for All Urban Consumers, published by the Bureau of Labor Statistics, between the month in which the member retires and the month immediately prior to the month in which the member dies; except that in the case of members hired on or after November 10, 1996, the increase	2550
758	Informational	Definitions	Definitions	POLFF	Police or fire service is used to determine when a person is eligible to retire, and is used, along with creditable service, to calculate benefits. Creditable FERS service may be purchased under the Police plan.	2551
759	Informational	Definitions	Definitions	Both POLFF and Teachers	The term "creditable service" means military service and government service for which the conditions necessary to receive service credit are met.	2552
760	Informational	Definitions	Definitions	POLFF	Term Translation: 5 years normal service= deferred benefit eligible.	2553
761	Informational	Definitions	Definitions	Both POLFF and Teachers	The term "Federal benefit payment" means that part of a retirement benefit based upon service accrued through June 30, 1997, the payment of which is the responsibility of the U.S. Government.	2554
762	Informational	Definitions	Definitions	Both POLFF and Teachers	The term "District benefit payment" means that part of a retirement benefit based upon service after June 30, 1997, the payment of which is the responsibility of the government of the District of Columbia.	2555
763	Informational	Definitions	Definitions	Both POLFF and Teachers	Hire date means the date the employee entered on duty.	2556
764	Informational	Definitions	Definitions	POLFF	Pre-80 hire means an individual whose annuity is computed using the formula under the Police and Firefighters Plan applicable to individuals hired before February 15, 1980	2557
765	Informational	Definitions	Definitions	Both POLFF and Teachers	Salary reduction does not apply to retired members rehired as fully sworn temporary full-time or temporary part-time police officers, or as public school security personnel.	2558
766	Informational	Definitions	Definitions	Both POLFF and Teachers	(a) In General.--Subject to the succeeding provisions of this subtitle, a "Federal benefit payment" is any benefit payment to which an individual is entitled under a District Retirement Program, in such amount and under such terms and conditions as may apply under such Program.	2703
767	Informational	Definitions	Definitions	Both POLFF and Teachers	Appointment Date = Department Appointment Date (i.e., For transferees, such as Secret Service, it's the date he is hired to the Secret Service).	2704
768	Informational	Definitions	Definitions	POLFF	The terms "disabled" and "disability" mean disabled for useful and efficient service in the grade or class of position last occupied by the member by reason of disease or injury, not due to "vicious habits" or intemperance as determined by the Police and Fire Clinic, or willful misconduct as determined by the Mayor.	2705
769	Informational	Definitions	Definitions	POLFF	Police or fire service is used to determine when a person is eligible to retire, and is used, along with creditable service, to calculate benefits.	2714

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770	Informational	Definitions	Definitions	Both POLFF and Teachers	Term Translation: entry on duty = hire date = appointment date.	2715
771	Informational	Definitions	Plan Participation	Both POLFF and Teachers	Police and Others are 100% vested in their own contributions, 0% vested in government funds, and are deferred benefit eligible after 5 years of police and firefighter service.	2716
772	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	The system shall issue benefit payments for voluntary or involuntary retirement start immediately upon retirement and are payable for the life of the teacher.	1226
773	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	Eligibility for voluntary retirement - At age 62 with at least 5 years of eligible service, i.e., five years of service in the District of Columbia public day schools.	1227
774	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	Eligibility for voluntary retirement - At age 60 with 20 years of service, including at least 5 years of eligible service.	1228
775	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	Eligibility for voluntary retirement - At age 55 with 30 years of service, including at least 5 years of eligible service.	1229
776	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	Eligibility for voluntary Retirement - At any age with at least 5 years of eligible service and 30 years of total service, if the teacher was hired on or after November 1, 1996.	1230
777	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	If a teacher leaves the system before he or she is eligible to retire, but after completing five years of eligible service, he or she may elect to receive a deferred pension payable at age 62. Absent such an election, or if a teacher leaves before completing five years of eligible service, he or she will receive a refund of his or her retirement contributions as soon as practicable after separation. Deferred retirees are not eligible to continue health care benefits or to receive life insurance coverage into retirement.	1231
778	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	If a teacher retires because he or she becomes physically or mentally disabled and incapable of satisfactorily performing his or her duties after completing 5 years of eligible service and before becoming eligible for voluntary retirement, he or she may qualify for a disability pension	1232
779	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	Except for disability retirees, the amount of retirement benefits payable is not potentially affected by earnings from other employment.	1233
780	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	The plan pays death benefits to a teacher's spouse and eligible children, or dependent parents if there is no surviving spouse or eligible child, if the teacher dies before retirement, provided the teacher has completed eighteen months of eligible service.	1234
781	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	If a teacher dies after retirement, his or her eligible surviving children will be entitled to an annuity. Whether a surviving spouse receives an annuity depends upon the election made by the teacher at the time of retirement. Upon retirement, a married teacher may elect a life annuity with no annuity to the surviving spouse, or a reduced life annuity with an annuity to the surviving spouse in any amount up to 55% of what the teacher's benefit would have been if he or she had elected a life annuity with no annuity to the surviving spouse. In the alternative, a married teacher may elect at the time of retirement a reduced life annuity providing for a life insurance benefit payable in a lump sum at the time of the teacher's death. The benefit can be in any amount up to the total amount of retirement contributions with interest to the date of retirement.	1235

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782	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	A teacher who is unmarried at the time of retirement and in good health may elect a life annuity with no survivor annuity, or a reduced life annuity and an annuity payable to a survivor annuitant who has an insurable interest in the teacher. The survivor annuitant's payment is 55% of the reduced annuity received by the teacher.	1236
783	Informational	Highlights Of The Plan	Highlights Of The Plan	Teachers	An unmarried teacher also has the option to elect instead a reduced life annuity with a life insurance benefit payable in a lump sum at the time of the teacher's death. The benefit can be in any amount up to the total amount of retirement contributions with interest to the date of retirement.	1237
784	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	Officers or members of the Metropolitan Police Force or the Fire Department of the District of Columbia (collectively, "members") participate in the Police Officers and Firefighters Plan (the "plan") automatically upon starting work.	2525
785	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	Members of the plan contribute part of their salary to pay for retirement benefits.	2526
786	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	If a member separates from the Police Force or Fire Department before he or she is eligible to retire, but after completing at least five years of service with the D.C. police or fire department ("police or fire service"), he or she is eligible for a deferred pension payable at age 55 or upon separation, whichever is later.	2527
787	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	A member who is eligible for a deferred pension may instead elect, at the time of separation, to receive a refund of his or her retirement contributions.	2528
788	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	If a member separates from the Police Force or Fire Department before completing five years of eligible service, he or she will receive a refund of his or her retirement contributions.	2529
789	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	Retirement benefits are based on the amount of time worked for either the Metropolitan Police Force or the D.C. Fire Department, certain creditable military and civilian government employment, and average pay.	2530
790	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	If a member was hired before February 15, 1980, he or she is eligible for optional retirement anytime after having 20 years of police or fire service.	2531
791	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	If a member was hired on or after February 15, 1980 but before November 10, 1996, he or she is eligible for optional retirement anytime after reaching age 50 and having 25 years of police or fire service.	2532
792	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	If a member was hired on or after November 10, 1996, he or she is eligible for optional retirement after having 25 years of police or fire service.	2533
793	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	Regardless of when a member is hired, normal mandatory retirement age is 60. The Mayor can extend the mandatory age in his discretion.	2534
794	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	A member may be eligible to receive retirement benefits if he or she becomes disabled before reaching eligibility for optional retirement.	2535
795	Informational	Highlights Of The Plan	Highlights Of The Plan	POLFF	If a member becomes disabled in the performance of duty, he or she will receive a retirement salary regardless of how long he or she has worked for the department.	2536

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796	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The replacement pension system will be the single system users access to perform pension administration business functions for processing the applicable pension plans. Non-federal annuitants may also be contained in the system at DCRB discretion.	1830
797	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Core Program Requirements are the capability to: Apply and use different Eligibility rules for multiple plans to verify and validate- Membership; Voluntary and involuntary retirement; Vested retirement; Disability, service related; Survivors' benefit; Deferred benefits;	1831
798	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Provide and use different Service Credit rules and applications for multiple plans considering use of-	1839
799	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Actual service performed	1840
800	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Purchased service	1841
801	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Other service (sick leave, Leave Without Pay (LWOP), etc)	1842
802	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Military Service	1843
803	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Track, report and use the results of different Contribution rules and rates for multiple plans involving-	1844
804	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Regular contributions	1845
805	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Deposits for purchased service	1846
806	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Provide different Benefit Amount Calculations for multiple plans for-	1848
807	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Regular retirement	1849
808	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Early retirement	1850
809	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Deferred Retirement	1851
810	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Disability	1852
811	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Cost-of-Living Allowances	1853

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812	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Refunds and Lump Sum Credit payments	1854
813	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Retroactive adjustments to annuities of individuals and/or groups [No functionality for Groups in R1]	1855
814	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Apply different Survivor Benefit rules for multiple plans.	1856
815	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Eligibility rules	1857
816	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Contribution rules	1858
817	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Calculation and payment rules	1859
818	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Other miscellaneous rules (children, former spouses, etc.)	1860
819	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Apply different Pension Payment rules for multiple plans.	1861
820	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Administratively track appeal issues	1862
821	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Capture SF 2806/IRR -related data	1864
822	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Record and report on contribution data (based on payroll cycle data received by the system) for employees participating in the District of Columbia Defined Contribution Plan	1865
823	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Pension system will record Pension Benefit contributions from participants.	1866
824	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system will identify discreet periods and types of service used in the retirement computation including:	1867
825	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Use of Other Service Credit. The system will include the ability to track credited service in other eligible employment and appropriately use that service in determining length of service and/or calculating a retirement benefit.	1868
826	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Multiple Plans. The system will allow concurrent administration of multiple retirement plans.	1869
827	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system will support different categories of contributory pension plans.	1870
828	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Employee Withholdings, Deposits, And Contributions: The Employee Withholdings, Deposits, and Contributions core process pertains to the requirements detailing the calculation, amount and remittance of funds of an employee's payroll withholdings, deposits, and related contributions before the money is credited to the appropriate trust fund. The following items summarize the topic areas for this core process:	1871

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829	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system will document every pension contribution payment processed by the system (e.g., payment type, date, source, pension fund destination, etc.) for both Federal and District purposes, including: Regular contributions.	1872
830	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Interest attributable to each account as appropriate	1874
831	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Service Credit Purchase deposits	1875
832	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Annuity Roll Maintenance: The Annuity Roll Maintenance core process requirements pertain to the maintenance and administration of annuities and alternate payees information. This core process addresses maintenance of data including address changes, payment instructions, adjusting payments, response to correspondence and inquiries from annuitants or former employees, verifying continued eligibility for benefits, terminating, suspending, adjusting, or restoring annuity payments, and changing various deduction items and tax withholding instructions.	1877
833	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system will be designed to allow an annuitant's pension to be suspended in the event a retiree is temporarily no longer entitled to annuity payments (specific suspension reasons per each plan).	1878
834	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system will be designed to allow a suspended pension to be subsequently reactivated when appropriate	1879
835	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system will be designed to incorporate all computational adjustments and account maintenance for	1880
836	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	COLAs and equalization increases	1881
837	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Changes to benefits in compliance with labor contracts	1882
838	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Retroactive adjustments to annuity benefits of individuals and/or categories of pensioners	1883
839	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Compliance with Court Orders impacting both individuals and/or groups	1884
840	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system will provide screens and other data input mechanisms to document cases that are affected by:	1885
841	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Settlements	1886
842	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Court decisions	1887
843	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Other QDRO [Qualified Domestic Relations Order] Applications. The system will be adaptable for different QDRO business rules under multiple retirement plans	1888

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844	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system should allow beneficiary payments to be made to multiple payees and deference made to the annuitant's record.	1889
845	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Federal Employees Health Benefits Program Requirements: The Federal Employees Health Benefits Program (FEHBP) requirements pertain to the information and actions necessary to administer health benefits to eligible annuitants and beneficiaries and to provide funds and information required by the program. This information includes:	1890
846	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Eligibility for and Election of Coverage	1891
847	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Subscription Charges	1892
848	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Direct Payment of Subscription Charges	1893
849	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Federal Employees' Group Life Insurance Requirements: The Federal Employees' Group Life Insurance (FEGLI) program requirements pertain to the information and actions necessary to administer Life Insurance to eligible annuitants and beneficiaries and to provide information required by the program: Basic and Optional Life Insurance Charges for an Annuitant Certification of Life Insurance Coverage Designations of Beneficiaries Assignments Direct Premium Payments	1894
850	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Core Calculation Capabilities. The system will provide core calculation capabilities, including a toolkit incorporating all types of benefits calculations with few or no limitations, including service credit employee contributions, deposits, refunds and garnishments	1901
851	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	New Formulas. The system will allow new, or modification of existing, retirement benefit formulas for multiple plans to meet any new plan requirements.	1902
852	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Concurrent Use of Different Formulas. The system will support using different retirement benefit formula(s) for each plan administered by the system, and where necessary combine the results of different benefit formulas to create one unified benefit amount for the annuitant	1903
853	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Maintain historical benefit calculation formulas for retroactive and historical benefit calculation.	1904
854	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Use of All Data Elements. The system will allow retirement benefit formulas to be calculated using any piece of information in the system (i.e., the formula will not be restricted to using only a few data elements).	1905
855	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Use of Any Data Value. The system will support retirement benefit formulas, which take effect based on an individual's data values in the system (e.g., hire dates, type of service, positions, pay grades, length of service, etc.).	1906
856	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Use of Other Service Credit. The system will include the ability to track credited service in other eligible employment under the District system and appropriately use that service in calculating a retirement benefit.	1907

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857	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	COLAs. The system will support periodic increases, such as cost-of-living adjustments (COLAs), including retroactive COLAs, and equalization increases for all categories of annuitants	1908
858	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Annuitants may receive multiple annuity streams with the same plan, and each stream may have a different COLA.	1909
859	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Benefit Vesting. The system will support benefit vesting rules and calculations.	1910
860	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Retirement Classifications. The system will apply business rules to support retirement calculations for multiple plans under provisions for - Voluntary retirement Involuntary retirement Full disability retirement	1911
861	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Spouses Minor children Disabled children Adult children in school Former spouses	1916
862	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Purchased Service Credit. The system will support the rules and calculations necessary to bill members, record payments and associated service credits, and assign relative responsibility (Federal/District) for other Federal service as specified in the multiple plans administered by the system for:	1922
863	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The Purchase of Service Calculator, within the system, needs to have the functionality to have a field on the Purchase of Service Calculator page to enter in the original refund amount. The refund amount will be the amount the member was originally paid out. The refund amount will be used to calculate the redeposit amount plus interest. The date of the refund, which is also specified on the 2806 form, will be used as the Purchase of Service end date. In addition, the Purchase of Service Calculator must also support functionality to calculate additional service where no deductions were taken. Service where no deductions were taken will be outlined in the Purchase of Service Letter for the member decide whether he or she wants to purchase.	1923
864	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system has the ability to maintain a list of third party vendors and related information for payment tracking.	1924
865	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The system delivers the ability to validate all data entry fields based on user-defined business rules.	1925
866	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide unchecked "Calculate All Plans" check box on Calculate Pension Main Panel.	1926
867	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Pension plan should default based on plan associated with Empl. ID. (Calculate Pension Main Panel)	1927
868	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	12. Process Employee Normal RetirementPA_CLC_PROTECT (Protect Calculation)	1930
869	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	List of protection reasons should include: 1) Estimate Calculation 2) Final Calculation Candidate 3) Former Final Calculation 5) Final Calculation 6) Other	1931

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870	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	This drop down list will be tied to the plan of the EmplID so that the reasons for the calculation are plan specific. (e.g. Disability in Service)	1932
871	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Set Archive Results field to six months AFTER current date. Note: Users can delete rows in the system.	1933
872	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide Assumed Hours Amount from Plan Inputs Panel.	1934
873	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "assumed contributions percentage" title and field.	1935
874	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Load External Employee Data" check box.	1936
875	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Assumed CPI Pct Incr." title and field.	1937
876	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Wage Base Escalation Rate" title and field.	1938
877	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Change "Assumed Earnings Amt" title to "Assumed Salary Amt".	1939
878	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	A final calc cannot have process selection. If "Use Process Selection Section" is checked the calc cannot be put in payment status.	1940
879	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Auto Benefit Amount" title and field	1941
880	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Guaranteed Payments" title and field	1942
881	Informational	Pension Summary Requirements	Pension	POLFF	For Police show supplemental survivor amount (Determined by the 10% reduction of the retiree's annuity). Hide field for other plan's.	1943
882	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Post 415" group	1944
883	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Remove "pre-415" group label.	1945
884	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Change "Average Earnings Amount" title to "Average Salary Amount." Field display, average salary.	1946
885	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Bottom half of panel should contain ONLY the following fields/columns: "Begin Date", "End Date", "Salary", "Time Factor"(equals yrs., months and days in the period), and "Weighted Salary" (equals salary multiplied by time factor).	1947
886	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Fields displayed in Year/Month/Day format instead of decimal format for different service types.	1948

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887	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Change "Beneficiary" to "Survivor" under Payee Type drop down.	1949
888	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Default Benefit Plan field with appropriate Pension Plan according to Empl ID and name.	1950
889	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	In "Payment Options" group box "Percent Continued" should read "Amount Continued".	1951
890	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	In "Payment Options" group box display options chosen in "View Optional Forms Available" instead of "Guaranteed Payments".	1952
891	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	"Optional Forms Set" field should be plan specific.	1953
892	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Percent Continued", "Guaranteed Payments" and "Payment Frequency" field.	1954
893	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Instead of "Percentage Continued" and "Guaranteed Payments" fields, display the fields that are included on the "Payee Form Selection Panel".	1955
894	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Calculation Panel needs to be able to handle multiple beneficiary calculations	1956
895	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Need to add field on panel for QDRO percentage. No additional hours required for this added functionality.	1957
896	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	"Benefits Base" option group does not apply to DC plans	1958
897	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	"Plan Type" and "Benefit Plan" options must match those options that are currently available.	1959
898	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Hide "Assume Salary Scale Pct. Incr." field in Core release. In the Core + release this field will be enabled for the personnel office users.If FAE is modified, then this will need to be hidden going forward, unless projections are programmed into the modification.	1960
899	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Need the ability to enter purchasable service in Year/Month/Day instead of giving a From and To date.	1961
900	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Need the capability to add more than one beneficiary	1962
901	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	COLA - calculates the COLA amount as well as any retro adjustment for the COLA	1963
902	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The calculation of the adjustment amount within the vanilla product is manual. The system needs to be able to calculate this amount based on the time of retirement and the time they are placed into payment.	1964
903	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Need to display survivor name (possibly SSN also if room is available) on this panel	1965

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904	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	When death is the reason entered in the Action/Reason field (Job Data Panel) the Date of Death field (Payee Personal Data 2 Panel) will be populated with the appropriate effective date (date of death)	1966
905	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	OPM and DC Health Benefits must be handled separately.This can be handled without modification by setting up separate life and health benefit options for OPM & DC benefits.	1967
906	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	QDRO Process Needs numerators and denominators in addition to QDRO Percent/QDRO Amount. The QDRO percentage is further reduced by a numerator and denominator. Inclusion of numerators and denominators further reduce the QDRO	1968
907	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Requirements need to be captured to more accurately estimate this.Need to create a table and panel to maintain COLA percentages since 1969 to be able to calculate teacher's survivor benefits. The plan provisions require that the survivor's benefit have all COLA's applicable since the original retiree retired.	1969
908	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Need to create a table to hold monthly CPI factors to calculate Police & Fire benefits. The provisions in this plan require that the survivor's annuity be calculated using an 'adjusted' FAE where the FAE used at the original retirement date is inflated	1970
909	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Duration Option	1971
910	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Calculate nontaxable and taxable income	1974
911	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Generate calculations for retroactive adjustments to annuities for all categories of pensioners	1975
912	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Purchase of Service/Military Service/Other Creditable Service	1976
913	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Calculation and Maintenance of Taxable Income	1977
914	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Conversion of UPPS data to new system	1978
915	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Term Translation : PeopleSoft Plan Eligibility = D.C. Coverage.	1979
916	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The term "child" means -- (A) an unmarried child under eighteen years of age, including (i) an adopted child, and (ii) a stepchild or recognized natural child who lived with the member in a regular parent-child relationship.	1987
917	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	(B) an unmarried child regardless of age who is incapable of self-support because of mental or physical disability incurred before age eighteen; or	1988

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918	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	(C) an unmarried child between eighteen and twenty-two years of age who is a student regularly pursuing a full-time course of study or training in residence in a high school, trade school, technical or vocational institute, junior college, college, university or comparable recognized educational institution. For the purpose of this paragraph, a child whose twenty-second birthday occurs before July 1 or after August 31 of a calendar year, and while the child is regularly pursuing such a course of study or training, is deemed to have become twenty-two years of age on the first day of July after that birthday. A child who is a student is deemed not to have ceased to be a student during an interim between school years if the interim is not more than five months and if the child shows to the satisfaction of the Secretary of the Treasury that the child has a bona fide intention of continuing to pursue a course of study or training in the same or different school during the school semester (or other period into which the school year is divided) immediately after the	1989
919	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The term "lump-sum credit for retirement" means the unrefunded amount consisting of -- (A) retirement deductions made from the basic salary of a member; and (B) amounts deposited covering earlier creditable service.	1990
920	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The term "retirement salary" means the annual benefit to which a retired member is entitled by law.	1993
921	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The term "total service" means the total of years, months and days of member service and the years and months of credited service.	1994
922	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The term "creditable service" means military and civilian service performed by the member that is otherwise creditable under section 8332 of Title 5 of the United States Code (Civil Service Retirement System, including most service with the D.C. Government commencing before October 1, 1987, but does not include service under the Federal Employees Retirement System). Each month of credited service equals 1/12 of a year	1995
923	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The term "former spouse" means a living person whose marriage to an employee or retiree has been subject to a divorce, annulment, or legal separation resulting in a court order, except that with respect to an award of a survivor annuity, it additionally means a living person: (A) Who was married for at least 9 months to an employee or retiree who performed at least 18 months creditable service in a position covered by the Police, Fire and Teachers' retirement plan; and (B) Whose marriage to the employee or retiree was terminated prior to the death of the	1996
924	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The servicing personell offices determines if that person is coded as "Police, Fire, Teachers' eligible member";	1997
925	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	If a member leaves a DCRB Retirement Plan, system after joining the pension plan and is later rehired, the member rejoins the plan the day he or she is re-employed.	1999
926	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	If the member has not previously redeposited, each member subject to this section shall deposit in the fund, with interest computed in accordance. A member may elect to make such deposits in installments during the continuance of the service in such amounts as may be determined by DCRB.	2000
927	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Basic contributions are deducted from a member's pay each pay period and deposited into the the Police, Fiire, or Teachers' Retirement Fund.	2002

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928	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Service can result from multiple appointments.	2004
929	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Eligibility for voluntary disability retirement is determined by years of total service. Total service is used along with the member's basic salary immediately before retirement to determine how much the retirement salary will be.	2006
930	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Total service consists of years, months and days of member service and years and months of credited service.	2007
931	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	For member service, the formula uses service in years, months, and days. Accordingly, odd dates are used to determine the length of service used in the computation.	2008
932	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Service from appointment date as a member in the District of Columbia Police, Fire, or Teachers service.	2009
933	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	In addition to the years of member service, a member may elect to receive credit for military and civilian service performed by the member that is otherwise creditable under section 8332 of Title 5 of the United States Code (Civil Service Retirement System, including most service with the D.C. Government commencing before October 1, 1987, but does not include service under the Federal Employees Retirement System).	2012
934	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	For the period prior to January 1, 1948, the interest rate is 4% per year.	2018
935	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	For the period from January 1, 1948 through February 14, 1980, the interest rate is 3% per year.	2019
936	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	For the period from February 15, 1980 through September 30, 1980, the interest rate is based on the average rate of interest on interest-bearing obligations of the United States forming a part of the public debt.	2020
937	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	For the period from October 1, 1980 through April 31, 1999, the interest rate is based on the average rate of return on investment for the District of Columbia Retirement Fund	2021
938	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	For the period beginning May 1, 1999, the interest rate is based on the average rate of return on investment for the District of Columbia District of Columbia Retirement and Survivors Annuity Fund	2022
939	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	DCRB will identify exactly how much must be deposited. Payment may be made in a lump sum prior to or at the time of the member's retirement, or in installments during the continuance of the member's service. Payments may begin on an installment basis and be converted to a lump sum balance payable at a member's request.	2028
940	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	All credited service is used to calculate the pension benefit.	2035
941	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Term Translation: Deferred annuity= terminated vested= separated with title to deferred.	2060
942	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The total annual benefit is computed to the penny (and stored).	2067

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943	Informational	Pension Summary Requirements	Pension	teachers	Calculate the Creditable Service portion: Creditable service normally is calculated as follows: The first 5 years of creditable service are calculated as follows: Basic Pay x 1.5% x # of years (up to 5)	2071
944	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Payments to a non-disabled child survivor end upon marriage, death, attainment of age 18, or attainment of age 22 if the child is regularly pursuing a full time course of study or training, whichever occurs first. Payments to an unmarried child who is incapable of self-support because of mental or physical disability incurred before age 18 end upon marriage, death, or restoration of capacity for self-support, whichever occurs first.	2136
945	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Pursuant to a qualifying court order issued after March 15, 1989, a former spouse may be awarded all or a portion of the member's retirement benefits, a payment from the member's retirement benefits, or a survivor annuity.	2137
946	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	A qualifying court order states the former spouse's share as a fixed dollar amount, or a percentage or a fraction of an annuity, and must state whether the former spouse should receive payment directly from the DCRB For the purposes of awarding a survivor annuity, the qualifying court order must also state either the former spouse's entitlement to a survivor annuity or direct the member or retired member or member to provide a survivor annuity.	2138
947	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	A qualifying court order that is issued before retirement is enforceable. A qualifying court order issued after a member's retirement is enforceable only to the extent that it is consistent with any election previously executed at the time of retirement by the member regarding the former spouse. For example, where a member is married at the time of retirement, has elected a survivor annuity, and subsequently is divorced, a qualifying court order to continue the survivor annuity for the former spouse is enforceable. If the member was married at the time of retirement and did not elect a survivor annuity, a subsequent qualifying court order to provide a survivor annuity to the former spouse is not enforceable.	2139
948	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	[Updated from OGC review to remove references to Equalization] ALL: Retroactive COLA Adjustments (Functional Requirements - 8.12 COLAs, page 24) Minimum Requirement: The current system has the capability to automatically apply a Retroactive COLA increase to the current annuities as described in Process for Applying Cost of Living Increases. The current system is required at times to handle special requirements of court orders such as application of interest. The current system calculates the retroactive annuity adjustments by subtracting the old Base Annuity from the new Base Annuity for each pay period of the retroactive period to derive the adjustment amount; and produced detailed documentation of each adjustment.	2142
949	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	The current system automatically applies all COLAs and prorated COLAs to the yearly annuities for groups of annuitants. Minimum Requirements: Refer to the attached document entitled Process for Applying Cost of Living Increases.	2143
950	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	A child over 18 who is a student remains a child during an interim period between school years if the interim is not more than 5 months and the child shows to the satisfaction of DCRB that he/she has a bona fide intention of continuing to pursue a course of study or training immediately after the interim [11-1561(8)(c)]. Thus, the child continues to receive benefits during an approved interim period because he/she is still a "child". [11-1568(c)(2)(B), (3)]. The child would receive any COLAs that become effective during the interim period.	2155

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951	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Processing of QDRO (Qualified Domestic Relations Order) Some court orders describe the method to determine the percent of the retiree's annuity to which the former spouse is entitled. The order states a denominator and a numerator to use a formula. The current system provides a mechanism to derive this percent using the manual input of a denominator and numerator. Minimum Requirements: The new system must provide the automated mechanism for the examiner to produce this percent at least in the same manner as the current system.	2160
952	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	When calculating ages, the 30 day month and 360 day rules do not apply. Use actual year's months and days. Must add a day to the separation date before determining the age on benefit commencement date.	2164
953	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	CSRS service is counted in only years and months. Accordingly, odd days are dropped to determine the length of CSRS service used in the computation.	2165
954	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	30-Day Month/360-Day Year: For retirement computation purposes, all months have 30 days. No credit is given for the 31st day of the month. The 28th day of February constitutes 3 days (or the 29th day of February constitutes 2 days). For retirement computation purposes, a year consists of 360 days (12 x 30 days).	2166
955	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	If the hire date is the 31st, the employee get credit for the day (as though the hire date were the 30th). Credit is not allowed for the 31 under any other circumstances. On the other end, a retiree who annuity commences on the 31st (that is, separates on the 30th) is entitled to credit for the 30th and to a day's annuity for the 31st. In all other circumstances, the 31st is ignored for determining amount annuity due. The rule is stated in the regulations at 31 CFR 29.105(b).	2167
956	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Period of Service Ending on the Last Day of a Month: Since all months are considered to have 30 days for retirement purposes, if the ending date of a period of service is the last day of any month, simply use 31 for that day when you compute the length of service.	2168
957	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Age calculations do not use 30 day month 360 day year. During configuration confirmation, it was discovered that age calculations use actual ages and not the 30 day month 360 day year as previously indicated. When calculating the age at benefit commencement date and the age at event date, add a day before performing the calculation. The following duration calculations in PeopleSoft are affected: A1ABCD_DU Age at Benefit Commencement A1AEVT_DU Age at Event Date P1MBSB_DU Difference in age between retiree and survivor T1INSR_DU Difference in age between retiree and insurable interest.	2169
958	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Request 'Unique' calculation reason code for each calculation type. When running a benefit calculation, PeopleSoft provides 'calculation' reason codes. In addition to re-designing some of the currently provided calculation reason codes, the customer would like to add additional calculation reason codes so that a one-to-one relationship exists between a benefit calculation type and calculation reason code.	2170
959	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Users require a customized calculation worksheet that shows each step in the benefit calculation. (i.e. service, salary, formula, reductions, etc.).	2172
960	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	User requests to see all service as a total amount, (e.g. Departmental + Purchased + Military).	2173

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961	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Unexpended Balance Payout functionality desired in PeopleSoft - The unexpended balance is defined as the ending contribution balance less any payments made to the retiree or survivors. It is paid out when a retiree or survivor dies before the sum of payments made to the retiree and their survivors is less than their ending contribution balance. PeopleSoft provides the ability to perform a partial contribution withdrawal, but does not provide an automated means to calculate the amount as described above.	2175
962	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	It appears that, in most cases, a refund of survivor annuity contributions after the annuity starting date will not result in payments over a different term, so that Section 1.72-11(e) will not apply (and will not result in reduced annuity payments, which would trigger a different relief rule). In these cases, a refund of survivor annuity contributions after the annuity starting date will be fully taxable pursuant to Section 72(e)(2)(A). The Service is currently considering the continuity validity of Subsection 1.72-11(e). Therefore, while you are justified in relying on this regulation for 1998 reporting, you may not be able to rely on this regulation for subsequent years.	2176
963	Informational	Pension Summary Requirements	Pension	Both POLFF and Teachers	Temporary Continuation of Coverage(TCC) Code (FC0131 and FC0132) The automated system can accommodate up to two TCC HB deductions for each annuitant.	2181
964	Technical Requirements	Audit	Quality Review	Both POLFF and Teachers	Quality Reviews: The system will have the capability to support periodic quality reviews.	2240
965	Technical Requirements	Audit	Auditing	Both POLFF and Teachers	Audit Processes: The system will have the capability to support various audit processes	2241
966	Technical Requirements	Audit	Auditing	Both POLFF and Teachers	Provide participant and beneficiary level audit trail detail and summary data of all System activities.	2242
967	Technical Requirements	Audit	Auditing	Both POLFF and Teachers	The system will record any service disruptions over the entire life cycle of the system that result from the external entities.	2273
968	Technical Requirements	Audit	Auditing	Both POLFF and Teachers	All audit logs must be maintained for 5 years.	2506
969	Technical Requirements	Audit	Hosting	Both POLFF and Teachers	Hosting provider will permit, and support as necessary, periodic audits and certification efforts of hosted site.	2516
970	Technical Requirements	Audit	Auditing	Both POLFF and Teachers	Audits - The agency (customer) shall not be restricted from performing security audits as required for compliance with District and federal policies, and for ensuring agency data is protected at rest and in use.	3247
971	Technical Requirements	Contact Management	Self Service		Self-Service Portals - Employers/HR Partners: Payroll reconciliation tools	3230
972	Technical Requirements	Contact Management	Auditing	Both POLFF and Teachers	The system will store contact history with timestamps, agent ID, channel used, and resolution status.	3368
973	Technical Requirements	Contact Management	Triggers	Both POLFF and Teachers	The system will support real-time communication triggers (e.g., confirmation emails after form submissions).	3369
974	Technical Requirements	Correspondence Management	Templates	Both POLFF and Teachers	The system will allow correspondence templates to be created and edited via a business-user-friendly interface.	3355

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975	Technical Requirements	Correspondence Management	Templates	Both POLFF and Teachers	The system will support variable substitution and conditional logic in correspondence templates.	3356
976	Technical Requirements	Correspondence Management	Batch Processing	Both POLFF and Teachers	The system will allow outputs to be queued, batch generated, and sent to secure print partners or portals.	3357
977	Technical Requirements	Correspondence Management	Auditing	Both POLFF and Teachers	The system will generate audit logs of all outbound correspondence, including the triggering event and delivery method.	3358
978	Technical Requirements	Correspondence Management	Viewing and Downloading	Both POLFF and Teachers	The system will support PDF generation and inline display of letters/documents in member and staff portals.	3359
979	Technical Requirements	Correspondence Management	Batch Processing	Both POLFF and Teachers	The system will allow bulk processing of correspondence (e.g., COLA notifications) with batching, preview, and review queues.	3360
980	Technical Requirements	Correspondence Management	Integration	Both POLFF and Teachers	The system will integrate with DCRB's secure print vendor to transmit print jobs in encrypted batches.	3361
981	Technical Requirements	Document & Imaging	Integration	Both POLFF and Teachers	The system must support secure integration with the following systems: FileNet and Kofax (document intake and storage); Banking partners, U.S. Treasury, tax and audit systems; Contact center platforms (e.g., Amazon Connect); and Microsoft Office for email and notification.	3244
982	Technical Requirements	Document & Imaging	Integration	Both POLFF and Teachers	The system will support integration with DCRB's ECM solution (e.g., FileNet) to store and retrieve documents.	3336
983	Technical Requirements	Document & Imaging	User Interface & Accessibility	Both POLFF and Teachers	The system will allow users to scan, upload, tag, and index documents to specific member or employer records.	3337
984	Technical Requirements	Document & Imaging	Version Control	Both POLFF and Teachers	The system will support version control and history tracking for all uploaded or generated documents.	3338
985	Technical Requirements	Document & Imaging	Retention Policy	Both POLFF and Teachers	The system will allow administrators to configure retention policies and auto-archiving rules for documents.	3339
986	Technical Requirements	Document & Imaging	Viewing and Downloading	Both POLFF and Teachers	The system will provide full-text search within documents (OCR-enabled PDFs, scanned forms, etc.).	3340
987	Technical Requirements	Document & Imaging	Viewing and Downloading	Both POLFF and Teachers	The system will support secure viewing, downloading, and printing of documents with role-based access.	3341

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988	Technical Requirements	Document & Imaging	Viewing and Downloading	Both POLFF and Teachers	The system will include a viewer to preview documents without requiring local download.	3342
989	Technical Requirements	Document & Imaging	Metadata & Indexing	Both POLFF and Teachers	The system will allow metadata mapping between BAPS records and document storage/index fields.	3343
990	Technical Requirements	Document & Imaging	Metadata & Indexing	Both POLFF and Teachers	The system will support barcodes or QR codes on outbound letters for automatic inbound indexing.	3344
991	Technical Requirements	Document & Imaging	Batch Processing	Both POLFF and Teachers	The system will include tools to batch upload and classify documents during bulk onboarding or conversion.	3345
992	Technical Requirements	Document & Imaging	Document Sharing	Both POLFF and Teachers	The system will allow secure document sharing links to be sent to members, with expiration and access tracking.	3346
993	Technical Requirements	Document & Imaging	Document Security	Both POLFF and Teachers	The system will enforce file type restrictions and virus scanning for uploaded content.	3347
994	Technical Requirements	Document & Imaging	Document Security	Both POLFF and Teachers	The system will allow secure tagging of documents for specific business processes (e.g., appeals, death claims, QDROs).	3348
995	Technical Requirements	Document & Imaging	Version Control	Both POLFF and Teachers	The system will support annotations, redactions, and markup tools with versioning controls.	3349
996	Technical Requirements	Document & Imaging	Document Sharing	Both POLFF and Teachers	The system will allow linking of documents to multiple related entities (e.g., member + employer + transaction).	3350
997	Technical Requirements	Member and Employer Portals	Realtime Updates	Both POLFF and Teachers	The member and employer portals will allow real-time updates and reflect changes made in the core BAPS system.	3370
998	Technical Requirements	Member and Employer Portals	Document Downloads	Both POLFF and Teachers	The system will allow members and employers to download historical correspondence in PDF format from their portal account.	3376
999	Technical Requirements	Member and Employer Portals	Data Upload	Both POLFF and Teachers	The system will allow an active payroll file be uploaded to DCRB with active member demographic, service history and contribution history securely. The system will send a notification of formatting errors to DCRB and employer as well as the status of the uploaded file.	3388
1000	Technical Requirements	Member Counseling	CRM & Communication	Both POLFF and Teachers	The CRM will log calls, emails, chat sessions, letters, and portal messages as part of each contact record.	3363
1001	Technical Requirements	Member Counseling	Metadata & Indexing	Both POLFF and Teachers	The CRM will allow multiple contact roles per entity (e.g., member, alternate contact, employer admin, billing contact).	3364

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1002	Technical Requirements	Member Counseling	Scheduling	Both POLFF and Teachers	The system will support scheduling outbound communication (e.g., seminar invites, payment reminders).	3365
1003	Technical Requirements	Member Counseling	Scheduling	Both POLFF and Teachers	The system will allow integration with Microsoft Outlook for syncing appointments and contact activity.	3366
1004	Technical Requirements	Member Counseling	Escalation Handling	Both POLFF and Teachers	The system will allow contact records to be flagged as sensitive or high-priority, with elevated handling rules.	3367
1005	Technical Requirements	Pension System	System Documentation	Both POLFF and Teachers	System Documentation. System documentation will record all decisions and steps taken on changes and/or upgrades to system design, hardware, firmware, software or related specifications.	2243
1006	Technical Requirements	Pension System	Portal	Both POLFF and Teachers	The system shall reduce or eliminate redundant key entry operations by pre-populating data fields on the screen with existing system data and making use of data from other systems as appropriate.	2244
1007	Technical Requirements	Pension System	Disaster Recovery	Both POLFF and Teachers	Disaster Recovery. Provide capability to perform all acts necessary to establish and maintain adequate disaster recovery mechanisms, including the development of application security plans, and periodic tests of the continuity of support and incident response capability	2247
1008	Technical Requirements	Pension System	System Documentation	Both POLFF and Teachers	System Specifications. The product will come with complete documentation, including system specifications, user and system interfaces, and user procedures, to enable integrations with external systems.	2248
1009	Technical Requirements	Pension System	End User Documentation	Both POLFF and Teachers	The system shall include complete end-user documentation to aid users in the installation of the system.	2249
1010	Technical Requirements	Pension System	End User Documentation	Both POLFF and Teachers	The system shall include complete end-user documentation to aid users in the configuration of the system.	2250
1011	Technical Requirements	Pension System	End User Documentation	Both POLFF and Teachers	The system shall include complete end-user documentation to aid users in the use of the system.	2251
1012	Technical Requirements	Pension System	System Documentation	Both POLFF and Teachers	The system shall include complete developer documentation to aid developers in using any delivered development tools.	2252
1013	Technical Requirements	Pension System	System Documentation	Both POLFF and Teachers	The system shall include complete developer documentation to aid developers in making enhancements to the application, to the extent feasible.	2253
1014	Technical Requirements	Pension System	Integration	Both POLFF and Teachers	The system will be designed to accept subsidiary data feeds from other systems.	2254
1015	Technical Requirements	Pension System	System Defaults	Both POLFF and Teachers	The system will be designed to allow record and data elements to be hard coded to pay and/or withhold specified benefit amounts not automatically computed within the system, with appropriate approvals. The system will document all entries.	2255
1016	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	Point In Time Reporting. The system will include a mechanism for point in time reporting capabilities (i.e., the ability to generate reports about effective-dated data for any discrete period of time). Non-effective dated data can be reported on an as-is basis	2258

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1017	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	The system delivers the ability to integrate decision support tools with graphical views for high-level analysis with drill down capabilities (i.e. OLAP, or Online Analytical Processing Tool).	2259
1018	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	The system delivers the ability to write, retrieve, and store queries to generate ad-hoc reports from all system fields with appropriate security access.	2260
1019	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	The system delivers the ability to selectively route destinations for standard and ad-hoc reports. The system delivers the ability to selectively print to local user printers or central high-speed printers.	2262
1020	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	The system provides different types of reporting tools to meet different levels of user sophistication.	2263
1021	Technical Requirements	Pension System	Integration	Both POLFF and Teachers	System reports will be updateable to reflect changes to other related systems or to feeding systems (e.g., Amazon Connect, etc.) for New Records added to system in last X days, months, or other time frame.	2264
1022	Technical Requirements	Pension System	Integration	Both POLFF and Teachers	System reports will be updateable to reflect changes to other related systems or to feeding systems (e.g., Amazon Connect, etc.) for New Records added to system in last X days, months, or other time frame.	2265
1023	Technical Requirements	Pension System	Integration	Both POLFF and Teachers	System reports will be updateable to reflect changes to other related systems or to feeding systems (e.g., Amazon Connect, etc.) for Existing records modified or otherwise updated, by plan membership, in last X days, months, or other time frame	2266
1024	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	The system delivers the ability to create reports which use any defined system data item or value in the report.	2267
1025	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	Analytical Tools. Delivers the ability to perform what-if analysis using internal and external data (must include the ability to capture and retain data used in the analysis).	2268
1026	Technical Requirements	Pension System	Data Management	Both POLFF and Teachers	The system delivers automated data management and conversion capabilities.	2275
1027	Technical Requirements	Pension System	User Interface & Accessibility	Both POLFF and Teachers	The system delivers a common look and feel and functionality across all modules within the application.	2276
1028	Technical Requirements	Pension System	User Interface & Accessibility	Both POLFF and Teachers	The system includes a mechanism to deliver a warning message to a user or list of users based on a pre-defined date. A particular message (e.g., "Check to see if interest rates have changed") is associated with a particular date (e.g., July 1, 2000). The system includes a mechanism to add new date/message combinations and to maintain or delete existing	2277
1029	Technical Requirements	Pension System	User Interface & Accessibility	Both POLFF and Teachers	The system delivers an integrated tool set, which provides a common look-and-feel and functionality across all modules within the application.	2279
1030	Technical Requirements	Pension System	User Interface & Accessibility	Both POLFF and Teachers	The system includes a mechanism to ensure transactional integrity (i.e., ensures transaction aborts or other failures are completely rolled back).	2288

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1031	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	The system has the capability to support 50 concurrent end users	2289
1032	Technical Requirements	Pension System	Integration	Both POLFF and Teachers	The system provides an approach for integrating vendor and third-party products with the package (e.g., IVR packages, imaging packages, e-mail, scanning, electronic forms, electronic approvals, signatures, etc.).	2290
1033	Technical Requirements	Pension System	Integration	Both POLFF and Teachers	The system includes a mechanism for creating batch interfaces with other systems for inbound and outbound data flows, including EDI and EFT (e.g., legacy systems, new systems, external systems, business solutions, etc.).	2292
1034	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	The system provides an approach for using digital certificates for authentication.	2299
1035	Technical Requirements	Pension System	Self Service	Both POLFF and Teachers	The system provides capabilities for users to update pension application information and other system information using online screens.	2307
1036	Technical Requirements	Pension System	Backup & Recovery	Both POLFF and Teachers	The system provides the ability for performing nightly data backups while continuing to perform core on-line processing.	2317
1037	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	The system delivers an integrated security framework allowing assigning different security access levels to different users.	2319
1038	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	The system delivers the ability to create access level restrictions within the security framework which apply to all system objects and users.	2320
1039	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	The system includes a mechanism for administering security for all users from a single location.	2321
1040	Technical Requirements	Pension System	Policy & Procedures	Both POLFF and Teachers	System shall comply with all applicable requirements of 1974 Privacy Act	2346
1041	Technical Requirements	Pension System	Policy & Procedures	Both POLFF and Teachers	System shall comply with all applicable requirements of Freedom of Information Act	2347
1042	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	Account should lockout after 5 failed login attempts. Account should remain locked until unlocked by administrator.	2420
1043	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	User session shall time-out after 20 minutes of idle activity.	2421
1044	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	Log-on banner shall be displayed on login notifying unauthorized users that they have accessed a U.S. government computer system and unauthorized use can be punished by fines or imprisonment where applicable.	2488
1045	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	The system shall include an access control scheme and other security measures to ensure that data or information in the system is only accessed by authorized personnel	2494

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1046	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	The system delivers the ability to write, retrieve, and store queries to generate ad-hoc reports from all system fields with appropriate security access.	2495
1047	Technical Requirements	Pension System	Incident Response	Both POLFF and Teachers	Incident response capability must exist that includes: - incident identification and analysis - escalation procedures to contact appropriate personnel - 24/7 available response personnel to isolate, contain, and recover from incident - computer forensics capability if situation dictates evidence collection	2512
1048	Technical Requirements	Pension System	Backup & Recovery	Both POLFF and Teachers	System backup plan and procedures must be defined	2517
1049	Technical Requirements	Pension System	Policy & Procedures	Both POLFF and Teachers	System rules of behavior must be defined	2519
1050	Technical Requirements	Pension System	Policy & Procedures	Both POLFF and Teachers	Standard security operating procedures must be defined	2520
1051	Technical Requirements	Pension System	Environments	Both POLFF and Teachers	Scalable Infrastructure: Support horizontal and vertical scaling to handle growth in member records, user sessions, and processing demands without degradation in performance.	3231
1052	Technical Requirements	Pension System	Hosting	Both POLFF and Teachers	Cloud-Ready Deployment: Support deployment in a FedRAMP-authorized equivalent cloud or FISMA-compliant private cloud. Hybrid deployment models will be considered if compliant with DCRB's hosting policies.	3232
1053	Technical Requirements	Pension System	User Interface & Accessibility	Both POLFF and Teachers	Configurable (Not Coded) Logic: Business rules, plan configurations, calculations, and workflows should be data-driven and modifiable through administrative interfaces without vendor intervention.	3233
1054	Technical Requirements	Pension System	High Availability and Disaster Recovery	Both POLFF and Teachers	High Availability and Disaster Recovery: Ensure system uptime and continuity through geographic redundancy, failover capabilities, and disaster recovery strategies with defined RTO/RPO metrics.	3234
1055	Technical Requirements	Pension System	Environments	Both POLFF and Teachers	Separation of Environments: Strict segregation of Production, Staging, Development, and Training environments, with appropriate role-based access controls.	3235
1056	Technical Requirements	Pension System	Data Management	Both POLFF and Teachers	Data protection and Security - The systems must provide support for external security audits, penetration testing, and vulnerability scanning	3236
1057	Technical Requirements	Pension System	Data Management	Both POLFF and Teachers	Data protection and Security - The systems must have Data encryption at rest and in transit (AES-256 minimum)	3237
1058	Technical Requirements	Pension System	Data Management	Both POLFF and Teachers	Data protection and Security - The systems must have Multi-factor authentication (MFA) for all staff users; optional for member access	3239
1059	Technical Requirements	Pension System	Data Management	Both POLFF and Teachers	Data protection and Security - The systems must have Granular role-based access controls, with administrative override logging	3240

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1060	Technical Requirements	Pension System	Data Management	Both POLFF and Teachers	Data protection and Security - The systems must have Audit trails for all data changes, logins, and administrative actions	3241
1061	Technical Requirements	Pension System	Hosting	Both POLFF and Teachers	Data Location - All agency data must be encrypted at rest, and reside within the United States, including regular data backups that are sent to an alternate storage facility.	3242
1062	Technical Requirements	Pension System	User Interface & Accessibility	Both POLFF and Teachers	Accessibility and User Experience - The system must be fully responsive and accessible via desktop workstations, laptops and smart phones. The system meets Web Content Accessibility Guidelines (WCAG) 2.1 Level AA accessibility standard.	3245
1063	Technical Requirements	Pension System	Environments	Both POLFF and Teachers	System Operating Capacity - At a minimum the system should scale to support 10,000 Active; 1,500 Inactive Vested; and 14,000 Retired Members. The number of Active Members is assumed to remain stable. The increase over the past 5 years has been less than 1% per year. The number of Retired Members has increased by approximately 5% per year over the same time frame.	3246
1064	Technical Requirements	Pension System	Technical Controls	Both POLFF and Teachers	E-Discovery - The offeror will meet e-Discovery and litigation hold requests when applicable, and must attest to understanding the process, and performing the tasks of locating, preserving, collecting, processing, reviewing, and producing the electronically stored information (ESI). Likewise, any third-party request for ESI must be promptly notified to the agency for further action and approval by the agency.	3248
1065	Technical Requirements	Pension System	Access Control and Authentication	Both POLFF and Teachers	FOIA access – Agency must be able to access and retrieve data from the contractor (CSP) environment in a timely manner to meet its obligations under the District of Columbia Freedom of Information Act, D.C. Code §§ 2-531 et seq.	3249
1066	Technical Requirements	Pension System	Technical Controls	Both POLFF and Teachers	Preservation of Records – In collaboration with the Offeror (Cloud Service Provider), the agency responsibilities for records management and disposition of records created and stored in the cloud hosted system, will be carried out. The agency must be given the capability to extract/copy all permanent records and transfer them to the appropriate storage facility.	3250
1067	Technical Requirements	Pension System	Data verification/logic checks	Both POLFF and Teachers	Sytem should have logic checks across multiple references and functions	3311
1068	Technical Requirements	Pension System	Analytics and Reporting	Both POLFF and Teachers	User friendly query on system fields	3312
1069	Technical Requirements	Plan Rules Engine	Rules Engine	Both POLFF and Teachers	The system will support dynamic business rule changes through a visual interface without source code modification.	3351
1070	Technical Requirements	Plan Rules Engine	Rules Engine	Both POLFF and Teachers	The system will include a low-code rule engine that enables non-technical users to maintain validation and eligibility logic.	3352
1071	Technical Requirements	Plan Rules Engine	Rules Engine	Both POLFF and Teachers	The system will track configuration changes and provide rollback options for parameter and rule changes.	3353
1072	Technical Requirements	Plan Rules Engine	Effective Dates	Both POLFF and Teachers	The system will support effective-dating for configuration rules (e.g., plan limits by date range).	3354

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1073	Technical Requirements	Return Mail	Integration	Both POLFF and Teachers	The system must log all returned mail items	3405
1074	Technical Requirements	Return Mail	Integration	Both POLFF and Teachers	The system must assign a unique ID to each return event for tracking and audit purposes.	3406
1075	Technical Requirements	Return Mail	Data verification/logic checks	Both POLFF and Teachers	The system must support address validation through USPS NCOA, CASS, or equivalent.	3407
1076	Technical Requirements	Return Mail	Data verification/logic checks	Both POLFF and Teachers	The system must allow for automatic and manual correction of address data.	3408
1077	Technical Requirements	Return Mail	Auditing	Both POLFF and Teachers	The system must maintain a history log for all address corrections.	3409
1078	Technical Requirements	Return Mail	Workflow Rules	Both POLFF and Teachers	The system must be able to configure rules for actions triggered by returned mail (e.g., notify staff, update records, suppress future mailings).	3410
1079	Technical Requirements	Return Mail	Integration	Both POLFF and Teachers	The system must enable integration with our CRM or data management system to synchronize address updates.	3411
1080	Technical Requirements	Return Mail	Workflow Rules	Both POLFF and Teachers	The system must allow for exception management workflows (e.g., unresolved address cases).	3412
1081	Technical Requirements	Return Mail	Analytics and Reporting	Both POLFF and Teachers	The system must provide dashboards and reports showing return trends (e.g., by campaign, region, date).	3413
1082	Technical Requirements	Return Mail	Data Exports	Both POLFF and Teachers	Exportable data formats (CSV, Excel, JSON).	3414
1083	Technical Requirements	Return Mail	Alerts and Notification	Both POLFF and Teachers	Alerting for excessive return rates or failure patterns.	3415
1084	Technical Requirements	Self-Service Portals	Document Uploads	Both POLFF and Teachers	The self-service portals will support secure document uploads with malware scanning and file type/size restrictions.	3371
1085	Technical Requirements	Self-Service Portals	Portal	Both POLFF and Teachers	The system will display personalized greetings and key member information on the member portal dashboard (e.g., plan, status).	3372
1086	Technical Requirements	Self-Service Portals	User Interface & Accessibility	Both POLFF and Teachers	The system will allow users to view a summary of pending tasks, correspondence, and appointments within the portal.	3373
1087	Technical Requirements	Self-Service Portals	Realtime Updates	Both POLFF and Teachers	The system will provide real-time status tracking of service requests submitted via the portal (e.g., service purchases).	3374

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1088	Technical Requirements	Self-Service Portals	User Interface & Accessibility	Both POLFF and Teachers	The system will display last login date/time and notify the user of suspicious login activity (e.g., new device/IP).	3375
1089	Technical Requirements	Self-Service Portals	User Interface & Accessibility	Both POLFF and Teachers	The system will support browser time zone and date formatting preferences for external users.	3377
1090	Technical Requirements	Self-Service Portals	Secure Messaging	Both POLFF and Teachers	The portal will allow users to initiate secure messaging with DCRB support teams, with threading and response tracking.	3378
1091	Technical Requirements	Self-Service Portals	Secure Messaging	Both POLFF and Teachers	The portal will support integration with chatbot or live agent tools for guided assistance and FAQs.	3379
1092	Technical Requirements	Self-Service Portals	Secure Messaging	Both POLFF and Teachers	The system will allow external users to request and schedule appointments, including calendar integration with DCRB staff.	3380
1093	Technical Requirements	Self-Service Portals	Access Control and Authentication	Both POLFF and Teachers	The system will enforce MFA (multi-factor authentication) for all portal users at first login or when risk is detected.	3381
1094	Technical Requirements	Self-Service Portals	Access Control and Authentication	Both POLFF and Teachers	The system will support secure password reset and account unlock processes, including CAPTCHA or security questions.	3382
1095	Technical Requirements	Self-Service Portals	Document Sharing	Both POLFF and Teachers	The system will restrict access to documents, screens, or functionality based on user type and role.	3383
1096	Technical Requirements	Self-Service Portals	Rules Engine	Both POLFF and Teachers	The system will allow business rules to define which services or features are visible based on membership status (e.g., retired, active).	3384
1097	Technical Requirements	Self-Service Portals	User Interface & Accessibility	Both POLFF and Teachers	The system will provide responsive design for external-facing portals, with mobile optimization for tablets and phones.	3385
1098	Technical Requirements	Self-Service Portals	User Interface & Accessibility	Both POLFF and Teachers	The system will provide consistent functionality across browsers and devices, including mobile-optimized forms and workflows.	3386
1099	Technical Requirements	Self-Service Portals	User Interface & Accessibility	Both POLFF and Teachers	The system will allow DCRB to configure what features are visible or accessible on mobile vs. desktop interfaces.	3387
1100	Technical Requirements	Training & Knowledge Transfer	Infrastructure	Both POLFF and Teachers	The vendor will deliver technical training and knowledge transfer sessions for infrastructure, data, and integration support teams.	3389
1101	Technical Requirements	Training & Knowledge Transfer	Infrastructure	Both POLFF and Teachers	The vendor will provide a documentation repository with diagrams, system configurations, and SOPs.	3390
1102	Technical Requirements	Training & Knowledge Transfer	Help Desk	Both POLFF and Teachers	The vendor will provide training for DCRB's help desk, power users, and support tiers in their respective domains.	3391

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1103	Technical Requirements	Training & Knowledge Transfer	Knowledge Base	Both POLFF and Teachers	The vendor will support a knowledge base or wiki for frequently asked questions, troubleshooting, and update history.	3392
1104	Technical Requirements	Training & Knowledge Transfer	Tooltips	Both POLFF and Teachers	The system will include embedded tooltips, in-app walkthroughs, and contextual help for end users.	3393
1105	Technical Requirements	Web-based Forms	User Interface & Accessibility	Both POLFF and Teachers	The system must support customizable web-based forms with a variety of field types (e.g., text input, dropdown, radio buttons, checkboxes, date selectors).	3394
1106	Technical Requirements	Web-based Forms	User Interface & Accessibility	Both POLFF and Teachers	Conditional logic must be supported to dynamically show or hide form fields based on user input.	3395
1107	Technical Requirements	Web-based Forms	User Interface & Accessibility	Both POLFF and Teachers	Forms must be mobile-responsive and fully functional across major browsers (Chrome, Firefox, Safari, Microsoft Edge).	3396
1108	Technical Requirements	Web-based Forms	Integration	Both POLFF and Teachers	The system must provide a built-in electronic signature feature or integrate with a third-party provider (e.g., DocuSign, Adobe Sign).	3397
1109	Technical Requirements	Web-based Forms	Document Uploads	Both POLFF and Teachers	Users must be able to upload multiple supporting documents as part of the form submission process.	3398
1110	Technical Requirements	Web-based Forms	Document Uploads	Both POLFF and Teachers	Submitted form data and uploaded documents must be stored securely, with encryption at rest and in transit.	3399
1111	Technical Requirements	Web-based Forms	Messaging	Both POLFF and Teachers	Users must receive a confirmation message and an optional email copy of their completed submission.	3400
1112	Technical Requirements	Web-based Forms	Approvals	Both POLFF and Teachers	The solution should support single and multi-step workflows for approvals or additional signatures.	3401
1113	Technical Requirements	Web-based Forms	Alerts and Notification	Both POLFF and Teachers	Notifications must be sent via email (or in-app) when action is required (e.g., additional signature or review).	3402
1114	Technical Requirements	Web-based Forms	Auditing	Both POLFF and Teachers	An audit trail must be maintained for all user actions (submission, signing, document upload).	3403
1115	Technical Requirements	Web-based Forms	Access Control and Authentication	Both POLFF and Teachers	The platform must provide role-based access controls for form management and data visibility.	3404
1116	Technical Requirements	Workload and Case Management	User Interface & Accessibility	Both POLFF and Teachers	The system will provide the capability for business users to configure workflows using a drag-and-drop interface, without coding.	3315
1117	Technical Requirements	Workload and Case Management	Auditing	Both POLFF and Teachers	The system will support random sampling in workflows (e.g., flagging X% of refund approvals for extra audit).	3316

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1118	Technical Requirements	Workload and Case Management	Auditing	Both POLFF and Teachers	The system will allow business users to flag workflow tasks for audit or peer review.	3317
1119	Technical Requirements	Workload and Case Management	Workflow Rules	Both POLFF and Teachers	The system will enforce rules to prevent users from approving their own workflow submissions or requests.	3318
1120	Technical Requirements	Workload and Case Management	Documents & Images	Both POLFF and Teachers	The system will allow comment and document attachments at each workflow task or step.	3319
1121	Technical Requirements	Workload and Case Management	Triggers	Both POLFF and Teachers	The system will track time in each step of a workflow and aggregate cycle time by process.	3320
1122	Technical Requirements	Workload and Case Management	Triggers	Both POLFF and Teachers	The system will allow workflows to trigger based on external events (e.g., file received, eligibility updated).	3321
1123	Technical Requirements	Workload and Case Management	Analytics and Reporting	Both POLFF and Teachers	The system will provide dashboards to view outstanding, overdue, or reassigned tasks by team or user.	3322
1124	Technical Requirements	Workload and Case Management	Triggers	Both POLFF and Teachers	The system will provide administrators with controls to “force complete” stuck workflow tasks, with reason logging.	3323
1125	Technical Requirements	Workload and Case Management	Routing	Both POLFF and Teachers	The system will allow authorized users to create, update, and deactivate workflows without requiring vendor involvement.	3324
1126	Technical Requirements	Workload and Case Management	Routing	Both POLFF and Teachers	The system will allow conditional routing of tasks based on plan rules, member status, and configurable thresholds.	3325
1127	Technical Requirements	Workload and Case Management	Routing	Both POLFF and Teachers	The system will allow pause, resume, or reassign workflow tasks with full audit logging.	3326
1128	Technical Requirements	Workload and Case Management	Routing	Both POLFF and Teachers	The system will allow escalations based on aging rules, missed deadlines, or manual overrides.	3327
1129	Technical Requirements	Workload and Case Management	Processes	Both POLFF and Teachers	The system will support checklist-style workflows for complex processes (e.g., retirement eligibility).	3328
1130	Technical Requirements	Workload and Case Management	Processes	Both POLFF and Teachers	The system will support both parallel and sequential workflow models, including task dependencies.	3329
1131	Technical Requirements	Workload and Case Management	Routing	Both POLFF and Teachers	The system will provide workflow reporting for bottlenecks, SLA compliance, and task cycle time.	3330
1132	Technical Requirements	Workload and Case Management	Integration	Both POLFF and Teachers	The system will support integration of workflow steps with external systems (e.g., triggering correspondence or data sync).	3331

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1133	Technical Requirements	Workload and Case Management	Auditing	Both POLFF and Teachers	The system will log all workflow task assignments, completions, escalations, and status changes.	3332
1134	Technical Requirements	Workload and Case Management	Routing	Both POLFF and Teachers	The system will allow automatic reassignment of tasks in the event of staff departure, leave, or reorganization.	3333
1135	Technical Requirements	Workload and Case Management	User Interface & Accessibility	Both POLFF and Teachers	The system will provide drag-and-drop or graphical configuration tools for workflow setup and updates.	3334
1136	Technical Requirements	Workload and Case Management	Processes	Both POLFF and Teachers	The system will support user-configurable SLA thresholds, including email reminders and dashboard alerts.	3335
1137	Technical Requirements	Workload and Case Management	CRM & Communication	Both POLFF and Teachers	The system will include a built-in or integrated CRM with a 360° view of members, employers, and their interactions.	3362