



Retirement Processing System (RETM)



PUBLICATION CATEGORY
Retirement Processing

PROCEDURE MANUAL
Retirement Processing System (RETM)



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Latest Update Information

The following changes have been made to the RETM procedure:

Section	Description of Change
Adding a Tracking Record	Added new Type Application codes for phased retirement.



System Overview

The Retirement Processing System (RETM) external procedure provides instructions for Agency personnel offices to track the processing of separated employees' Individual Retirement Records (IRR), including those involving applications for retirement benefits in the event of an employee's (1) retirement, (2) death, or (3) separation with a request for a refund of retirement contributions. RETM is an online data processing system of the United States Department of Agriculture (USDA).

RETM provides personnel offices with the capability of adding, modifying, reporting, and querying an RETM tracking record and printing a paper version of the IRR, Standard Form (SF) 2806 (Civil Service Retirement System (CSRS))/SF 3100 (Federal Employees Retirement System (FERS)).

Note: The IRR can be generated for employees at any time during employment.

For annuity-related separations, Agency personnel offices accept employees' applications. These applications along with other related documents (i.e., health and life insurance) are reviewed by the Agency personnel offices. (See the Processing Retirement Documents procedure manual located under the Retirement Processing publication category on the Publications page of the NFC Web site.) The Agency personnel offices then enter pertinent data into RETM to track the employee's applications before sending retirement package to the National Finance Center (NFC). Additional data needed to track the processing of the application is entered into RETM by NFC personnel and systemically upon release of the case to the Office of Personnel Management (OPM).

In addition to forwarding application packages, it is essential that personnel offices enter the separation action (Nature of Action (NOA)) and a Time and Attendance (T&A) Report flagged final prior to the payroll cycle in which an employee separates. Without these actions, the IRR will not generate systemically, causing processing delays.

Once all Agency actions are complete, NFC personnel reviews the IRRs and the applications and related documents to ensure that the application packages are complete. The applications are then submitted, along with the official SF 2806/SF 3100, to OPM within 30 days of the employee's separation date.



System Access

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Remote Terminal Usage and Security

For specific information about security for systems access, individual user identification (ID) and password, use of master control and directional keys, contact your Agency Security Officer. For information about connecting to and disconnecting from your telecommunications network, see the instructions that are provided with your specific network.

Sign-On

To access this system, you must:

1. Sign on to the NFC Mainframe. The NFC Mainframe Warning screen is displayed.

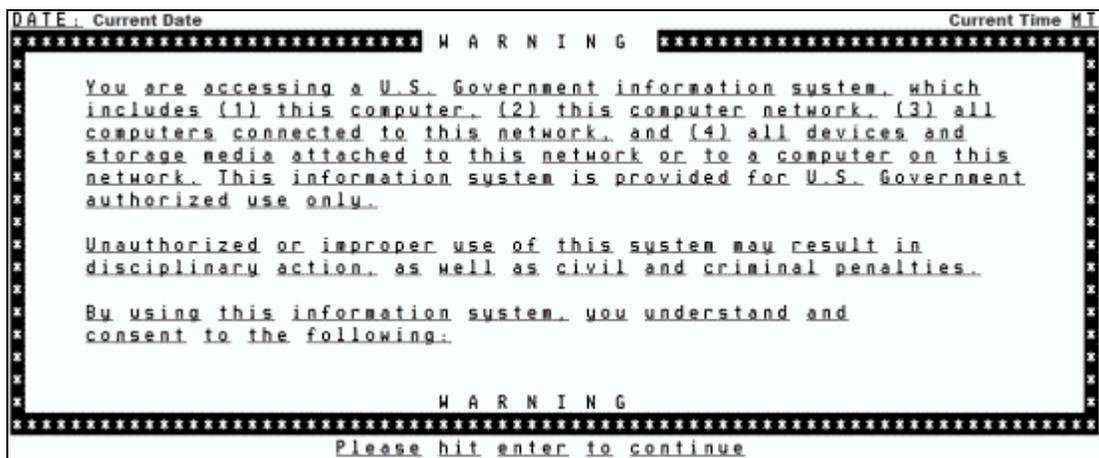


Figure 1: NFC Mainframe Warning Screen



2. Press **Enter** to display the NFC banner screen.

```

=====
== Current Date          SNX32703          T30N3022          PF1=HELP          ==
=====
==          NN      NN          FFFFFFFF          CCCCCCCC          ==
==         NNN     NN          FFFFFFFF          CCCCCCCC          ==
==        NNNN    NN          FF              CCC           ==
==       NN NN NN          FFFFFFFF          CCC           ==
==      NN  NNNN          FFFFFFFF          CCC           ==
==     NN   NNN          FF              CCCCCCCC          ==
==    NN    NN          FF              CCCCCCCC          ==
=====
==          National Finance Center          ==
== Office of the Chief Financial Officer          ==
== United States Department of Agriculture          ==
=====
==          For Authorized Use Only          ==
== ENTER USER ID =          PASSWORD =          NEW PASSWORD? N          ==
==                                     (Y or N)          ==
== ENTER APPLICATION NAME =          OR PRESS ENTER FOR MENU          ==
=====

```

Figure 2: NFC Banner Screen

3. Complete the fields as described below.

Field	Description/Instruction
Enter User ID	Type your assigned user identification (ID) (i.e., NF0999). Press Tab .
Password	Type your password. (Your password is not displayed on the screen.) Press Tab . Note: You may press Enter (instead of Tab) after typing your password to go directly to the CL/SUPERSESSION Main Menu screen.
New Password?	Displays system-generated "N." If you are not changing your password, press Tab. If you are changing your password, enter "Y." Then complete the steps for changing your password as described under Changing Your Password.
Enter Application Name	Type the application acronym and press Enter to go directly to that system. OR Leave the field blank and press Enter to go directly to the CL/SUPERSESSION.

4. At the CL/SUPERSESSION Main Menu screen:

- Press **F8** to scroll through the Session IDs until the appropriate Session ID appears.
- **Tab** until the cursor is located on the line next to the Session ID.
- Press **Enter**.



OR

- Press **F9** to bring the cursor to the Command Line at the bottom of the screen and retrieve a specific Session ID.
- Type **s**.
- Press the **space bar** once.
- Type the Session ID acronym.
- Press **Enter**. See screen below for an example. The applicable system is displayed.

```

----- Actions Options Commands Features Help
-----
KLSVSEL1                CL/SUPERSESSION Main Menu                More: +
Select sessions with the ENTER key or use a "/"
to display an action code.
  Session ID  Description                                Type      Status
-----
- IDMS05     IDMS05                                Multi
- PINQ05     IDMS05                                Multi
- ABCDINQ    IDMS03                                Multi
- ABCD       IDMS03                                Multi
- $DB2       TSDB $DB2      TSDB  PRDC($DB2  Multi
- $ORACLE    TSDA                                Multi
- $ORACLEA   TSDA                                Multi
- $SPFA      TSDA $SPFA    TSDA  PRDC($SPF  Multi
- $SPFAV2    TSDA $SPFAV2  TSDA  PRDC($SPF  Multi
- $SPFB      TSOB $SPFB    TSOB  PRDC($SPF  Multi
- $SPFBV2    TSOB $SPFBV2  TSOB  PRDC($SPF  Multi
- $SPFC      TSDC $SPFC    TSDC  PRDC($SPF  Multi

ISS7030I Password Changed
Command ==>
Enter F1=Help F3=Exit F5=Refresh F8=Fwd F9=Retrieve F10=Action
SYSB/T30N6447
    
```

Figure 3: CL/SUPERSESSION Main Menu Screen

```

----- Actions Options Commands Features Help
-----
KLSVSEL1                CL/SUPERSESSION Main Menu                More: +
Select sessions with the ENTER key or use a "/"
to display an action code.
  Session ID  Description                                Type      Status
-----
- IDMS05     IDMS05                                Multi
- PINQ05     IDMS05                                Multi
- ABCDINQ    IDMS03                                Multi
- ABCD       IDMS03                                Multi
- $DB2       TSDB $DB2      TSDB  PRDC($DB2  Multi
- $ORACLE    TSDA                                Multi
- $ORACLEA   TSDA                                Multi
- $SPFA      TSDA $SPFA    TSDA  PRDC($SPF  Multi
- $SPFAV2    TSDA $SPFAV2  TSDA  PRDC($SPF  Multi
- $SPFB      TSOB $SPFB    TSOB  PRDC($SPF  Multi
- $SPFBV2    TSOB $SPFBV2  TSOB  PRDC($SPF  Multi
- $SPFC      TSDC $SPFC    TSDC  PRDC($SPF  Multi

Command ==> s TMGT
Enter F1=Help F3=Exit F5=Refresh F8=Fwd F9=Retrieve F10=Action
SYSB/T30N6447
    
```

Figure 4: CL/SUPERSESSION Main Menu Screen (Session ID Displayed)



Sign Off

Follow the signoff-screen prompts at the bottom of the screen to exit the system or to return to the CL/SUPERSESSION Main Menu screen.

```
----- Actions Options Commands Features Help -----
KLSVSEL1          CL/SUPERSESSION Main Menu          More: +
Select sessions with the ENTER key or use a "/"
to display an action code.
  Session ID  Description                                Type      Status
-----
  IDMS05     IDMS05                                Multi     Current
  PINQ05     IDMS05                                Multi     Active
  KLSTERM1   Exit Menu
  Type a selection number or position the
  cursor on a line and press ENTER.
  1. Exit and terminate sessions (X)
  2. Exit and do not terminate sessions (N)
  3. Resume (R)
  Command ==>
  Enter  F1=Help  F12=Cancel
                                                    SYSB/T30N6447
  retrieve  F10=Action
```

Figure 5: CL/SUPERSESSION Main Menu Screen

1. At the CL/SUPERSESSION Main Menu screen, press **F3** and the Exit Menu popup is displayed.
2. Position the cursor in front of Exit and press **Enter** to exit and terminate the CL/SUPERSESSION.

OR

Position the cursor in front of Resume and press **Enter** to exit the application without terminating the CL/SUPERSESSION Main Menu screen.

Changing Your Password

If you need to change your password:



1. Type "Y" next to the New Password? prompt on the NFC banner screen.

```
=====
== CURRENT DATE          SNX32703          T30N6447          PF1=HELP          ==
=====
==          NN      NN          FFFFFFFF          CCCCCCCC          ==
==         NNN     NN          FFFFFFFF          CCCCCCCC          ==
==        NNNN    NN          FF              CCC          ==
==       NN NN NN          FFFFFFFF          CCC          ==
==      NN  NNNN          FFFFFFFF          CCC          ==
==     NN   NN          FF              CCCCCCCC          ==
==    NN    NN          FF              CCCCCCCC          ==
=====
==          National Finance Center          ==
==          Office of the Chief Financial Officer          ==
==          United States Department of Agriculture          ==
==          For Authorized Use Only          ==
== ENTER USER ID =          PASSWORD =          NEW PASSWORD? Y          ==
==                                     (Y or N)          ==
== ENTER APPLICATION NAME =          OR PRESS ENTER FOR MENU          ==
=====
```

Figure 6: NFC Banner Screen (with New Password? prompt set to Y)

2. Press Enter and the Change Password screen appears.

```
-----
KLGNPWD1          Change Password
-----
Type in your new password twice, and press ENTER.

Enter new password.....
Verify new password.....

Command ==>
Enter F1=Help F3=Exit F12=Cancel
-----
```

Figure 7: Change Password Screen

3. Enter the new password.
4. Verify the new password. Once you have entered your new password and verified it, the system will display another screen stating that the password was changed. See screen below.

Note: You may change your password at anytime, but no more than once a day. Before your password expires, you will be prompted to enter a new password.

```
-----
ISS7030I Password Changed
-----

Press ENTER to continue
-----
```

Figure 8: Password Changed Verification Screen



Operating Features

This section includes the following topics:

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System Design

RETM consists of one menu and four options (actions) for maintaining and retrieving data. The key field in each data record is the SSNO (Social Security number) field. This field is used to access data for a specific record after the record is entered in the database.

Help Screen

The help screen is available for all entry fields displayed on the Report Generation Help Screen. To obtain the Help screen from the Report Generation Screen, position the cursor on the field in question and press **PF5**. The Help screen is displayed and provides a description of the field either in narrative format or by listing the valid entry codes. Press **PF5** to return to the previous screen.

System Edits

RETM performs edit and/or validity checks on the entered data, as applicable. If the data does not pass system edits, errors are highlighted, and an error message appears at the bottom of the screen. All errors must be corrected before the record can be updated.

Function Keys

The program function (PF) keys are used to access RETM options. How these keys are identified depends on the equipment being used. Other function keys include Enter, Clear, and Tab. For detailed instructions on your equipment usage, see the appropriate manufacturer's operating guide. The functions of applicable PF keys are displayed at the bottom of each screen.



Agency Tracking Menu

After you have accessed RETM, the Agency Tracking Menu is displayed. This is RETM's main menu and provides four action options.

```
RM00011M      USDA - OCFO - NATIONAL FINANCE CENTER
                RETIREMENT PROCESSING SYSTEM -- RETM
                AGENCY TRACKING MENU

                ACTION CODES

                UPDATE (ADD/MOD) = U
                INQUIRY           = I
                PRINT RETM CARD  = P
                REPORTS          = R

                PLEASE ENTER:

                ACTION CODE:
                SSNO:

CLEAR=EXIT  ENTER=NEXT SCREEN
```

Figure 9: Agency Tracking Menu

The following is a brief description of each option:

UPDATE (Add/Mod) (Option **U**) - Add or modify a tracking record in RETM.

INQUIRY (Option **I**) - Query (view) an existing tracking record in RETM.

PRINT RETM CARD (Option **P**) - Print the paper version of the Individual Retirement Record, SF 2806/SF 3100.

REPORTS (Option **R**) - Generate a report.

To select an option, complete the fields as follows:

Field	Description/Instruction
Action Code	<i>Required, alpha, 1 position</i> Type the appropriate code: U , I , P , or R .



Field	Description/Instruction
SSNO	Required, numeric, 9 positions Type the employee's Social Security number (SSN). Press Enter .

Note: For all RETM screens, the fields displaying zeros (0) are numeric.

This section includes the following topics:

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Print RETM Card	18
Reports	20

Update (Add/Modify)

Update (Add/Modify) is the first option on the Agency Tracking Menu. This option is used to add a new tracking record or modify an existing record. To select and use the update option, follow the instructions below.

For more information see:

Adding a Tracking Record	15
Modifying a Tracking Record	16



Adding a Tracking Record

At the Agency Tracking Menu, type **U** at the Action Code prompt and type the employee's Social Security number at the SSNO prompt. Press **Enter**. The Personnel Office-Application Tracking screen is displayed.

```

RM06010M      U S D A - O F M - NATIONAL FINANCE CENTER
                RETIREMENT TRACKING SYSTEM - ADD / MODIFY
                PERSONNEL OFFICE - APPLICATION TRACKING

SSNO  _____
NAME:   LAST _____ FIRST _____ MIDDLE _
AGENCY/POI _____ SEPARATION DATE ___ ___ ___ NATURE OF ACTION ___
DATE APPLICATION RECEIVED PERSONNEL ___ ___ ___
DATE APPLICATION SENT TO NFC          ___ ___ ___

SELECT TYPE APPLICATION  ___      RETIREMENT COVERAGE CODE  _
01 = AGE                 12 = PHASED RET
02 = OPTIONAL            13 = FULL RET VOL
03 = EARLY OPTIONAL      14 = FULL RET ILIS
04 = DISCONTINUED SERVICE
05 = SEPARATION (NFC USE ONLY)
06 = PRELIM DISABILITY
07 = FINAL
08 = DEATH
09 = SUPPLEMENTAL (NFC USE ONLY)
10 = SEPARATION (REFUND)
11 = ATTACHMENT (NFC USE ONLY)
MODIFY ALLOWED ON "DATE APP RCVD PER" & "DATE APP SENT TO NFC" AFTER INIT INPUT
CLEAR=EXIT PF1=MENU PF2=REFRESH PF3=ADD PF4=MODIFY PF7=PREV REC PF8=NEXT REC
    
```

Figure 10: Personnel Office - Application Tracking Screen

Complete the fields as follows:

Field	Description/Instruction
SSNO	<i>System generated</i> Displays the employee's Social Security number.
Name	<i>System generated</i> Displays the name of the employee.
Agency/POI	<i>System generated</i> Displays the Agency/POI of the employee.
Separation Date	<i>System generated</i> Displays the separation date of the employee after the separation personnel action is entered into the EPIC Web, EmpowHR, or FESI Systems and applied to the Payroll/Personnel System database.
Nature of Action	<i>System generated</i> Displays the Nature of Action code after the separation personnel action is entered into the EPIC Web, EmpowHR, or FESI Systems and applied to the Payroll/Personnel System database.



Field	Description/Instruction
Date Application Received Personnel	<i>Required, numeric, 6 positions</i> Type the date the Agency personnel office received the employee's application in the month/day/year sequence.
Date Application Sent To NFC	<i>Required, numeric, 6 positions</i> Type the date the Agency personnel office sent the employee's application to NFC in month/day/year sequence.
Select Type Application	<i>Required, numeric, 2 positions</i> Type the appropriate type of application being filed, using the list on the screen.
Retirement Coverage Code	<i>System generated</i> Displays the employee's Retirement Coverage code.

After completing all data entry, press **PF3** to add the record to RETM. The message Retirement Tracking Record Stored is displayed at the bottom of the screen.

To add another record, press **PF2**; otherwise, press the applicable key as displayed at the bottom of the screen.

Modifying a Tracking Record

To Modify a Tracking Record:

1. At the Agency Tracking Menu screen, press **PF3**.
2. Type **U** at the Action Code prompt.
3. **Enter** the employee's SSN at the SSNO prompt.
4. Press **Enter**. The Personnel Office-Application Tracking screen is displayed showing the latest data for the selected employee.

Note: The only fields that may be modified are: Date Application Received Personnel and Date Applications Sent to NFC.

5. Type the new data over the data on the screen in accordance with the entry instructions provided for Adding A Tracking Record.
6. Press **PF4**. The message *Retirement Tracking Record Modified* is displayed at the bottom of the screen.



Note: To modify another record, press **PF2**. The screen is cleared for the entry of another SSN.

- After completing all modifications, press the applicable key as displayed at the bottom of the screen.

Inquiry

Inquiry is the second option on the Agency Tracking Menu. This option is used to query (view) tracking records on file for an employee.

To select this option, type **I** at the Action Code prompt and type the employee's SSN at the SSNO prompt on the Agency Tracking Menu screen.

Press **Enter** . The Application Tracking-Inquiry screen is displayed showing the latest data for the selected SSN.

```

RM07010M          U S D A - O F M - NATIONAL FINANCE CENTER          Current Date
                   RETIREMENT TRACKING SYSTEM -- RETM
                   APPLICATION TRACKING - INQUIRY

SSNO
NAME:      LAST          FIRST          MIDDLE
AGENCY/POI  0000    EMPLOYEE SEPARATION DATE 00 00 00  NATURE OF ACTION
SEPARATION PAY PERIOD AND YEAR 00 / 0000    TYPE CASE 00
CURRENT YEAR DEDUCTIONS          .00          CUMULATIVE DEDUCTIONS          .00

DATE APPLICATION RECEIVED IN PERSONNEL  00 00 00
DATE APPLICATION SENT TO NFC            00 00 00
DATE APPLICATION RECEIVED AT NFC        00 00 00
DATE PERSONNEL ACTION APPLIED          00 00 00

DATE APPLICATION/RETIREMENT RECORD SENT TO OPM  00 00 00 REGISTER NO.
NUMBER OF PROCESSING DAYS  000
TRACKING RECORD DOES NOT EXIST FOR THIS SSNO
CLEAR=EXIT  PF1=MENU  ENTER=NEW RECORD  PF4=FORMS  PF7=PREV REC  PF8=NEXT REC
    
```

Figure 11: Application Tracking - Inquiry Screen

Note: This screen includes data that was entered not only by Agency personnel offices but also by NFC personnel and by a systemic update.

NFC enters additional data into RETM to assist Agencies in tracking an employee's application. The date the employee's application was received by NFC is entered by NFC personnel. Data updated systemically by NFC on the first inquiry screen includes (1) the employee's current yearly



and cumulative deductions while payrolled by NFC, (2) the date the personnel action was applied to the Payroll/Personnel database, (3) the date the application was sent to OPM, (4) the register number, and (5) the number of days it took to process the action.

- To view additional records for the same employee, press **PF8**.
- To view a record for another employee, type the next SSN over the existing number on the first inquiry screen.
- Press **Enter**. The data for the selected SSN is displayed.
- To view additional records, repeat this process; otherwise, press the applicable key as displayed at the bottom of the screen.

Print RETM Card

Print RETM Card is the third option on the Agency Tracking Menu. This option is used to print a paper version of the Individual Retirement Record, SF 2806/SF 3100. The Individual Retirement Record can be generated for employees at any time during their employment. A sample of an SF 3100 is provided as **Exhibit 1** to this procedure. NFC generates the official Individual Retirement Record (a hardcopy printed on card stock) that is sent to OPM.

The SF 2806/SF 3100 depicts information regarding retirement contributions. Therefore, time worked by employees under an appointment not contributing to retirement would not be shown on the SF 2806/SF 3100. Also, for Departments converting to NFC's Payroll/Personnel System, deductions depicted on the SF 2806/SF 3100 begin at the time of conversion.

USDA Agencies that converted to NFC's Payroll/Personnel System have the remarks, Brought Forward, displayed under Fiscal Record on the paper version SF 2806/SF 3100. Brought Forward indicates the employee's previous retirement contributions before conversion.

To Print the RETM Card:

1. Type **P** at the Action Code prompt.



2. Press **Enter**. The Print Screen is displayed. If an employee's SSNO was entered at the SSNO prompt on the Agency Tracking Menu, it is automatically displayed.

```

RM04050M                NATIONAL FINANCE CENTER
                        RETIREMENT PROCESSING SYSTEM -- RETM
                        PRINT SCREEN

                        PRINT INFORMATION

JOB CHARACTER: A        SYSTEM OUTPUT CLASS: A
DELIVERY INFO:        REMOTE PRINTER ID:

    SSNO                SSNO                SSNO                SSNO
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000
000000000             000000000             000000000             000000000

CLEAR=EXIT  PF1=MENU  PF6=SUBMIT
    
```

Figure 12: Print Screen

3. Complete the fields as follows:

Field	Description/Instruction
Job Character	<i>Optional, alpha, 1 position</i> A is system generated and added to the job name to assist in identifying the printout. Another alpha character (A-Z), however, can be keyed in over the A .
System Output Class	C is system generated to designate a request for a printed copy.
Delivery Info	<i>Required, alphanumeric, 20 positions maximum</i> Type information to designate where the output job should be delivered (e.g., John Doe, Room 125).
Remote Printer ID	<i>Required, alphanumeric, 16 positions maximum</i> Type the number of the printer designated to print the Individual Retirement Record.
SSNO	<i>Optional, numeric, 9 positions</i> The Social Security number entered on the Agency Tracking Menu is



Field	Description/Instruction
	automatically displayed. If you want to change the SSNO, type over the existing number. This screen can accommodate 48 Social Security numbers. Type in additional Social Security numbers, if applicable.

4. Press **PF6** to submit the job. The message *JOB NFXXXXA Submitted* is displayed at the bottom of the screen. All of the SSNO data fields are cleared and zeros are displayed in preparation of additional entries.
5. Press the applicable key as displayed at the bottom of the screen, if no other entries are required.

Reports

Reports is the fourth option on the Agency Tracking Menu. This option is used to request any one of three RETM reports.

The Department Summary Report (**Exhibit 2**) lists, by Department and Agency, the number of processing days between the separation date and the date NFC submitted the application to OPM. This report provides information on annuities, refunds, and deaths.

The Agency/Bureau Summary Report (**Exhibit 3**) lists, by Agency (including serviced Agencies), the number of processing days between the separation date and the date NFC submitted the application to OPM. This report provides information on annuities, refunds, and deaths.

The Personnel Office Identifier (POI) Summary Report (**Exhibit 4**) lists the separated individuals name within the POI and the number of processing days between the separation date and the date submitted to OPM.



To select this option, Type **R** at the Action Code prompt. Press **Enter**. The Report Generation Screen is displayed.

```

RM04100M          U S D A , O F M , NATIONAL FINANCE CENTER          Current Date
                   REPORT GENERATION SCREEN

      DEPARTMENT:          AGENCY/BUREAU:          POI:

      TIME PERIOD  000000      TO  000000

      1.  DEPARTMENT SUMMARY REPORT
      2.  AGENCY/BUREAU SUMMARY REPORT
      3.  POI SUMMARY REPORT

      SELECT REPORT NO.

DELIVERY INFORMATION:          NUMBER OF COPIES: 1
SYSTEM OUTPUT CLASS : C          REMOTE PRINTER ID:

CLEAR=EXIT  PF1=MENU  PF5=HELP  ENTER=SUBMIT JOB
    
```

Figure 13: Report Generation Screen

Complete the fields as follows:

Field	Description/Instruction
Department	<i>Required, alpha, 2 positions</i> Type the Department code.
Agency/Bureau	<i>Required, alpha, 2 positions</i> Type the Agency or Bureau code.
POI	<i>Optional for Report Nos. 1 and 2, required for Report No .3, numeric, 4 positions</i> Type the personnel identifier code.
Time Period	<i>Required, numeric, 6 positions</i> Type the beginning date of the report in the month, day, year sequence.
To	<i>Required, numeric, 6 positions</i> Type the ending date of the report in the month, day, year sequence.



Field	Description/Instruction
Select Report No.	<i>Required, numeric, 1 position</i> Type the desired report number.
Delivery Information	<i>Required, alphanumeric, 20 positions</i> Type information to designate where the generated report should be delivered (e.g., John Doe, Room 125).
Remote Printer ID	<i>Required, alphanumeric, 16 positions maximum</i> Type the number of the printer designated to print the report.
System Output Class	A is system generated to designate a printed report.
Number of Copies	<i>Required, numeric, 1 position</i> Type the number of copies desired.

Press **Enter**. The message *Job Submitted* is displayed at the bottom of the screen. To request additional reports, type the new data over the existing data and press **Enter**.

If no other entries are required, press the application key as displayed at the bottom of the screen.

For assistance in completing these fields, move to the field in question and press **PF5** to display the Report Generation Help Screen.

```

RM04101M                U S D A . O F M . NATIONAL FINANCE CENTER                XX/XX/XX
                        REPORT GENERATION HELP SCREEN

DEPARTMENT   -  ENTER YOUR TWO POSITION DEPARTMENT CODE
AGENCY/BUREAU -  ENTER YOUR TWO POSITION AGENCY/BUREAU CODE
POI          -  ENTER 4 DIGIT PERSONNEL OFFICE IDENTIFIER CODE
TIME PERIOD  -  ENTER THE BEGINNING AND ENDING DATES OF THE TIME PERIOD
                THAT YOU WISH THE REPORT TO COVER.  DATES MUST BE IN MMDDYY
                FORMAT.
SELECT REPORT NO. -  ENTER 1, 2 OR 3 BASED ON WHICH REPORT YOU WANT PRINTED.
                  1 - SUMMARY LIST BY DEPARTMENT THE NUMBER OF PROCESSING DAYS
                  2 - SUMMARY LIST BY AGENCY THE NUMBER OF PROCESSING DAYS
                  3 - SSNO LISTING OF EACH ACTION PROCESSED WITHIN A SPECIFIC POI
DELIVERY INFORMATION -  ENTER IDENTIFYING INFORMATION NEEDED TO DELIVER REPORT
                        TO YOUR LOCATION.
REMOTE PRINTER ID -  ENTER YOUR REMOTE PRINTER ID.
SYSTEM OUTPUT CLASS -  ENTER A IF REPORT SHOULD BE PRINTED AUTOMATICALLY. IF
                        YOU DESIRE TO VIEW REPORT FIRST REFER TO TITLE VI,
                        SYSTEMS ACCESS MANUAL, CHAPTER 2, SECTION 2.
NUMBER OF COPIES -  ENTER NUMBER OF COPIES DESIRED. MAXIMUM IS 9.

CLEAR=EXIT                PF5=PREVIOUS SCREEN
  
```

Figure 14: Report Generation Help Screen

For more information see:

Reporting Through FOCUS 23



Reporting Through FOCUS

RETM is defined to the FOCUS Reporting System.

To retrieve RETM data, select the option for the Retirement Processing System (RETM) on the Payroll/Personnel Database Menu within the FOCUS Reporting System.

Two files are available in the FOCUS Reporting System for RETM. RETCLAIM contains tracking information, including information reflected on the Agency application tracking screen. RETMASTER contains information reflected on the Individual Retirement Record.



Exhibits

This section includes the following topics:

Sample of Individual Retirement Record SF 3100 (Paper Version) (Exhibit 1)	26
Sample of Department Summary Report (Exhibit 2)	27
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Sample of Individual Retirement Record SF 3100 (Paper Version) (Exhibit 1)

NAME: LAST		FIRST		MIDDLE		DOB		SSNO		AGCY		PAY OFC		LOCATION		PAY OFC NO	
DOE		JOHN		T		01 02 35		123 45 6789		USDA		NFC		N.O. LA.		12-40-0001	
<p style="text-align: center;">CARD 1 ***INQUIRY - SF3100***</p>																	
<p style="text-align: center;">XX-XXXX</p>																	
FISCAL RECORD																	
EFFECT DATE	ACTION	BASE PAY	REMARKS	YEAR	CAL SAL	YR DED	ACCUM SAL DED	REMARKS									
3/29/87	TRANS CAREER	18358.00	GS-07	1987	159.41		159.41	DED. BEGAN									
4/12/87	REASSIGNMENT	18358.00	GS-07	1988	.00		159.41	3/29/87									
4/12/87	PAY ADJ	18970.00	GS-07	1989	.00		159.41	SCD 01/05/85									
4/12/87	CORRECTION	18970.00	GS-07	1990	.00		159.41	PAY CEASED									
10/25/87	PAY ADJ	18358.00	GS-07	1991	.00		159.41	0/00/00									
11/08/87	REASSIGNMENT	18358.00	GS-07					NO UNUSED									
11/21/87	CHG IN SCD	18358.00	GS-07					S/L BALANCE									
	TERM-APT IN	18358.00	GS-07					DEDUCTIONS AND SERVICE									
								CERTIFIED CORRECT									



Sample of Department Summary Report (Exhibit 2)

DEPARTMENT SUMMARY REPORT		RETIREMENT PROCESSING FOR PERIOD			PAGE 1
XX XX XX THROUGH XX XX XX (DEPARTMENT WIDE)					
NUMBER OF DAYS BETWEEN SEPARATION DATE AND SUBMISSION TO OPM, BOYERS					
	0 - 28	29 - 58	OVER 58	TOTAL	
AMS (02)	11	2	0	13	
ANNUITIES	11	0	0	11	
REFUNDS	0	1	0	1	
DEATHS	0	1	0	1	
ARS (03)	26	2	0	28	
ANNUITIES	25	0	0	25	
REFUNDS	0	1	0	1	
DEATHS	1	1	0	2	
ASCS (05)	9	1	0	10	
ANNUITIES	9	0	0	9	
REFUNDS	0	0	0	0	
DEATHS	0	1	0	1	
FMHA (07)	32	0	0	32	
ANNUITIES	24	0	0	24	
REFUNDS	4	0	0	4	
DEATHS	4	0	0	4	

Sample of Agency/Bureau Summary Report (Exhibit 3)

AGENCY/BUREAU SUMMARY REPORT		RETIREMENT PROCESSING FOR PERIOD			PAGE 1
XX XX XX THROUGH XX XX XX (AGENCY WIDE)					
NUMBER OF DAYS BETWEEN SEPARATION DATE AND SUBMISSION TO OPM, BOYERS					
	0 - 28	29 - 58	OVER 58	TOTAL	
5026	3	0	0	3	
ANNUITIES	2	0	0	2	
REFUNDS	1	0	0	1	
DEATHS	0	0	0	0	
5027	1	0	0	1	
ANNUITIES	1	0	0	1	
REFUNDS	0	0	0	0	
DEATHS	0	0	0	0	
5029	1	0	0	1	
ANNUITIES	1	0	0	1	
REFUNDS	0	0	0	0	
DEATHS	0	0	0	0	



Sample of Personnel Office Identifier (POI) Summary Report (Exhibit 4)

POI SUMMARY REPORT					
RETIREMENT PROCESSING FOR PERIOD				PAGE	1
XX XX XX THROUGH XX XX XX (POI 1531)					
				NO. OF DAYS	
EMPLOYEE NAME	AG	SOC. SEC. NO.	TYPE APPLICATION	BETWEEN SEP. AND SUB. TO OPM	
DOE, JANE	52	000112222	02	19	
DOE, JOHN	53	000223333	06	19	
SMITH, JANE	54	000334444	04	13	

RETM Edit Messages (Exhibit 5)

Message

Agency Code Must Be Entered

Bad Find on Claimant Record

Bad Obtain on Forms - Rcd

Control - Error on Table Search

Database Exception for Tables

Date Appl Mailed NFC is a Required Field

Date Appl Recd Personnel Must Be a Valid Date

Date Sent to NFC Must Be Later Than or Equal to Date Received Personnel

Department Code And Agency Code Do Not Agree

Dup Rec Exhausted

Employee Last Name Cannot Be Spaces

End Date Must Be MM/DD/YY Format

Enter SSNO for Next Request



Invalid Agency Code Entered

Invalid Key - Validate Agcy Code/POI

Job Submitted

Key in New SSNO, Press Enter

Modify Allowed on "Date Appl/Rcvd Per" & "Date Appl/Sent to NFC" After Init Input

Modify not Allowed, Claim has Been Processed and Forwarded to OPM

Modify not Allowed, Type Application of "5", "9", and "11" are for NFC Use Only

Must Enter Delivery Information

Must Enter Job Character

Must Enter Remote Printer ID

Must Enter System Output Class

Must Press PF2 to Refresh Screen, Then PF3 to Store a New Tracking Record

Pers Off Ident Must Be Numeric

Please Enter an Agency Code

Press PF3 to Store New Tracking Record

Problem With Accessing Tracking Record - Contact Information Center - NFC

Problem With Transfer Back to Main Menu

Record Inactive - Error on Table Search

Report No. Must Be 1, 2, or 3

Retirement Tracking Record Modified

Retirement Tracking Record Stored

Start Date Must Be MM/DD/YY Format

SSNO Must Be all Numeric

SSNO not Within Your Security Access

SSNO Required



POI is a Required Numeric Field

Table Error - Request not Complete

There are More Than 12 Forms Missing for This SSNO - Only 12 Displayed on Screen

Tracking Record Does not Exist for This SSNO

Unable to Modify, NOA and EFF Date Duplicate

Unable to Modify Retirement Tracking Record

Unable to Obtain Claimant Record

Unable to Obtain Current Tracking Record

Unable to Store, Record Exists With the Same Separation Date and Nature of Action

Unable to Store Retirement Tracking Record

Valid Values for Employee Name are Letters A Thru Z (i.e., Commas not Allowed)

Valid Values for System Output Class are A and X

Valid Values for Type Application are 1 2, 3, 4, 6, 7, 8, or 10

Valid Values for Type Retirement Coverage are "F" and "C"

Validate Selection or Action Code



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