Federal Human Resource (FHR) Retirement Benefits Calculator on-line human resources (HR) processing tool

FOR

FOR THE FEDERAL AVIATION ADMINISTRATION (FAA)

STATEMENT OF WORK

The Contractor will provide:

a. A web-based interactive retirement benefits calculator with both an FAA human resources "benefits specialist" (from here on out refers to Benefits Operations Center [BOC] staff) function and the FAA "employee" (from here on out refers to non-BOC staff) benefits function that would allow the users to perform multiple retirement estimate calculations.

b. The retirement calculator should include a case assignment and case tracking function that allows BOC human resource benefits supervisors to assign and track cases that they assign to their BOC staff.

c. The retirement calculator should be hosted on the vendor's servers (the vendor must be FEDRAMP certified) and must be available via the internet 24 hours per day/7 days per week, unless the FAA is otherwise notified for vendor system maintenance. This feature applies to the specialist and employee versions.

d. The FAA benefits specialist performing the calculation must have the option to add data, utilize imported data, or change imported data to obtain standardized retirement calculations, which in turn would be provided to the employee.

e. It is imperative that retirement estimate calculations be accurate, and conform to applicable laws and current policies or guidelines established by the Office of Personnel Management (OPM), relating to Civil Service Retirement System (CSRS), CSRS Offset, and Federal Employees Retirement System (FERS) retirement and benefits. The specialist retirement calculator must include the ability to calculate retirement estimates under CSRS, CSRS Offset, and FERS, as well as any applicable special provisions.

f. The specialist calculator must provide the following calculation capabilities:

- Optional retirement;
- Voluntary early retirement authority;

- Phased retirement;
- Disability retirement;
- Discontinued service retirement;
- Deferred retirement;
- Death in service;
- Retirement estimates for special groups (Air Traffic Controller Specialists, Law Enforcement, Fire Fighters)
- Intermittent time;
- Part-time service;
- Leave without pay;
- Survivor benefits;
- Health insurance;
- Life insurance;
- Civilian and military service deposit and refund decisions;
- Sick leave projections;
- Thrift Savings Plan (TSP) benefits;
- Social Security options and impacts;
- FERS transfer comparison;
- Federal Erroneous Retirement Coverage Correction Act (FERCCA) elections;
- Retirement Code corrections (non-FERCCA);
- Alternative form of annuity;
- Severance pay;
- Voluntary Separation Incentive Pay calculation;
- Service computation date calculation;
- Economic adjustments.

g. The contractor must provide a user guide for the FAA benefits specialist and FAA employee retirement calculator functions in a web-based format. The specialist and employee user guide versions are separate.

h. The contractor must develop and apply modifications to reflect changes in laws and policies. If legal or regulatory requirements change, the contractor will be responsible for implementing those laws or requirements in a reasonable time acceptable to the COR. Changes to the retirement calculator must be timely, so as not to impair the accuracy of results available to FAA employees.

i. The contractor must provide FAA user-roles (Administrator, Supervisor, Benefits Specialist, Assistant, Employee) with associated user functions and role-related access (for FAA benefits specialists and FAA employees) to the retirement calculator. The contractor must provide verification processes for user login and password (this must include PIV Card or CAC login procedures, as well. Functions of roles are:

DRAFT

- Administrator – BOC staff will have the ability to add, modify, or delete user access.
- Supervisor – BOC supervisor will have the ability to assign and track cases to/for their employees.
- Specialist – BOC benefits specialist will have access to all functions listed in paragraph f.
- Assistant – BOC benefits assistant will have access to all functions listed in paragraph f. except FERCCA.
- Employee – FAA employees (non-BOC staff) will have access to their own service history only for the purpose of creating individual retirement scenarios.

j. The retirement calculator must have the ability to further define the user roles listed in paragraph i. by assigning the Supervisor, Benefits Specialist, and Assistant; access to FAA regions and Senior Executive Service(SES)/non-SES FAA employees' records.

k. The contractor must provide training and support for using the retirement calculator to FAA benefits specialists and FAA employees, through the helpdesk. There must be no additional charge for this training and support.

l. The contractor's staff will have access to sensitive records, including personally identifiable information, such as an employee's name, date of birth, and Social Security number. The contractor must prevent the unauthorized release of information obtained by its employees in performing work required by this contract. The contractor must ensure that its employees are aware of, and receive training, as necessary, on all laws and regulations, such as the Privacy Act, that restrict the release of information. Retirement estimates, service computation date calculations, and other data generated by the retirement calculator is the property of the FAA, and such information is protected under the Privacy Act. All retirement estimates and related data produced by the retirement calculator in electronic format or for copying and/or scanning must be encrypted (if electronic) or maintained in GSA-approved locked container (if printed material) files while under the contractor's custody and control.

m. The employee calculator function must be available. This function will allow employees to adjust their estimates to reflect different "what-if" scenarios concerning their retirement plans; permitting employees to obtain retirement estimates under the CSRS, CSRS Offset, and FERS.

n. Once the service history has been verified and "locked" by the FAA Benefits Specialist or Assistant, the employee calculator will allow employees to calculate an unlimited number of retirement estimates using various scenarios. The FAA employee will have the ability to select different retirement dates, health insurance and life insurance options, survivor benefit

DRAFT

options, etc. to calculate their estimates. The FAA employee could then contact the BOC with any questions or concerns.

o. The FAA employee calculator must provide the following calculation capabilities:

- Optional retirement;
- Voluntary early retirement authority;
- Phased retirement;
- Disability retirement;
- Discontinued service retirement;
- Deferred retirement;
- Retirement estimates for special groups (Air Traffic Control Specialists, Law Enforcement, Fire Fighters);
- Severance pay;
- Adjustments to economic assumptions;
- TSP;
- Social Security benefits;
- FERS Transfer comparison.

p. The benefits specialist calculator and the FAA employee calculator must be in a mutually compatible format, so that the results from two products can be meaningfully compared.

q. The contractor must provide planning, analysis, troubleshooting, integration, operations, maintenance, training to FAA benefits specialists and FAA employees (as applicable) on new functions or features developed after implementation, documentation, and administration services for the retirement calculator.

r. The contractor must maintain security measures per the FAA's Personally Identifiable Information policies and procedures.

s. The contractor must have subject matter experts in the subject matter of federal retirement process, policy, and special provisions (Air Traffic), to develop and maintain the retirement calculator to ensure that the retirement calculator follows the current laws, rules, and regulations pertaining to federal retirements and benefits. Privacy Act requirements stated here will also apply to subcontractors, if any.

NOTE: The contractor's experts must have high-level experience in the areas of consultation on specialized strategic HR and general management issues, leading and/or working on highly complex, difficult and sensitive projects; conceptualizes project goals and management plans; produces or reviews substantive and complex documents reflecting detailed knowledge of topic area. Relevant experience

includes, but is not limited to, experience in supporting and/or leading large projects related to federal retirement and benefits. These senior personnel must be recognized experts in the area of federal retirement and benefits. These senior personnel must have at least 5 years of professional experience in the area of federal retirement and benefits calculations; at least a bachelor's degree or equivalent experience; preferably a Master's degree and Professional in Human Resources (PHR) or Senior Professional in Human Resources (SPHR) certification.

t. Contractor must develop a database for downloading historical and current personnel and payroll data for all FAA employees, based on personnel and payroll transactions which affect employee's retirement calculations. Transaction downloads are not limited to processing SF-50's, health, life insurance, or other data changes that occur on a bi-weekly basis. The database will be used to populate the complete service history information for approximately 45,000 employees.

u. The retirement calculator must include a benefit forms library with self-populating forms necessary for the FAA benefits specialists to process a myriad of retirement and benefit functions (ex. retirement applications, military and civilian deposit/redeposit applications, death in service applications, etc.).

v. The FAA is required to provide a certification Form FAA 3300-30 (Creditable Service Computation) and an OPM Form RI 20-124 (Certification of Service Performed as a Law Enforcement Officer, Firefighter, Nuclear Materials Courier, Customs and Border Protection Officer [535 Service], or Air Traffic Controller [ATC]) for all retirement applications for employees who performed in an ATC covered position under specialized retirement coverage. An integrated FAA Form 3300-30 and Form RI 20-124 must be available, which will automatically generate and populate with an FAA employee's service history, based on ATC specialized retirement coverage codes (known as the "FAA Stat Spec") under job series 2152.

DRAFT