Process Flow Overview

SFA HR Automation

Classification:

Primary Functionality: Benefits Administration

Sub-functions: Retirement Calculations & Retirement Counseling

☑ "As-Is"
☐ "To-Be"

Description:

This "As-Is" flow provides an overview of the retirement calculations and retirement counseling process. The process is semi-automated through the use of Federal Retirement Calculations software (FRC Calc). The Employee Relations Specialist at HRG reviews the employee's Official Personnel Folder to get the employee's entire work history. The Employee Relations Specialist then uses FRC Calc to compute the retirement calculation and a calculator to compute life insurance. The employee is counseled on the calculation and has the opportunity to ask any questions to the Employee Relations Specialist.

Handoffs:

There are 2 handoffs in the "As-Is" Retirement Calculations & Retirement Counseling process. Handoffs occur between: employee - Employee Relations Specialist, and Employee Relations Specialist - employee.

Average Process Completion Time:

The average process completion time for calculating retirement benefits and counseling employees is two hours, but the process could range from 55 minutes to 2 ½ hours.

Position title	Agency name	Time/ request	Number of positions	Percent of time/year	Number processed/year
Employee Relations Specialist	HRG	2 hrs.	2	16%	312

Cost:

- FRC Calc: $285 per license for annual updates support services (excludes initial cost of ~$1,000)
- SFA-sponsored FTEs: ~$255,543 (based on 3 FTEs at an average OM salary of $85,181)

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Assumptions:

- The process flow assumes that there is a typical retirement calculation process, but retirement calculations are never the same and they therefore, do not necessarily follow the same procedure. Each retirement calculation is unique and varies depending on the employee's personal work history. For example, one retirement calculation might require the Employee Relations Specialist to calculate the high 3-year average salary, but another retirement calculation might not require that step. There are numerous ways to compute a retirement calculations and many permutations in the retirement calculation process. This process flow should, therefore, be used as an example of how one employee's retirement calculation is computed.

<u>Exclusions</u>: ▪ If an employee is placed in the wrong retirement system, then the Employee Relations Specialist enters the employee's name in the FERRCA database. OPM would then give the employee the choice of switching retirement systems or staying in the wrong retirement system. HRG proceeds with the case as directed by OPM. The subsequent process steps were excluded from the flow because they are unknown.
<u>Regions</u>: ▪ HR employees in the regions compute retirement calculations in the same way as headquarters. Both the regions and headquarters use FRC Calc software to compute retirement calculations. ▪ Employees in the regions do not have to wait as long to get a retirement calculation. The regions process retirement calculations in less time than in headquarters because they do not have as many calculation requests.
<u>Strategic Direction</u>: SFA HR can use the retirement calculation flow to gain a better understanding of how calculations are computed at HRG. After analyzing this process flow, SFA HR will be better equipped to make an educated decision about whether or not they should bring this function in-house. If SFA HR decides that HRG should continue to perform this function, SFA HR could use the process flow to write a strategic service-level agreement with specific guidelines to meet their needs. Alternatively, if SFA HR decides to take on this function, this process flow will be helpful in determining what resources they will need to compute retirement calculations for employees.