RETIREMENT INCENTIVE PLAN SAVINGS INSTRUCTIONS

The Retirement Incentive Plan Savings "RIP ROSTER" software is the first part of a 2 part process for agencies to identify retiring staff and collect information about their duties. Later, options-like software will be released for you, along with your OPM budget analyst, to evolve your post-retirement staffing plans.

PART I - RIP Roster Creation Steps

1. Identify retiring employees - CORE edits tab.
2. Create Program/Service Areas records - Program Definitions tab.
3. Update the RIP Roster worksheet. – RIP Worksheet tab
4. Notify your OPM budget analyst when you have completed your work.

IDENTIFY THE RETIREES

Retirement Incentive Plan Roster will be created from CORE Roster records, based on Incumbent Code.

- Open the "CORE Edits" tab and select all employees who have opted for the RIP and change the 'INCUMBENT_CODE" field to 'R'. "SAVE" will write the selected records to a separate RIP Roster table.

RIP PROGRAM/SERVICE AREA DEFINITION

You have the functionality to define Program or Service areas that are specific to your agency's mission and probably are not the 'budget level' program that we use for budget request. Later, you will link each retiree to one of these program/service areas.

- Open the "Program Definitions" tab to begin entering your program/service areas impacted by the RIP. You will enter a RIP **Program Name** for each area.

RETIREMENT INCENTIVE PLAN ROSTER

- Open the "RIP Worksheet" tab. You will find the records that you had selected in "CORE Edit".
- Check the pre-filled data; the yellowed fields are protected.
- Select a PROGRAM/SERVICE AREA from the drop down list; enter DUTIES_PERFORMED, a RETIREMENT_DATE and a LONGEVITY amount.
- FY2010_SAVINGS and FY2011_SAVINGS are calculated by Roster Rollout and brought forward to the worksheet.
- Roster Rollout does not calculate amounts for Part Time employees; you must input these amounts.
- You may sort on any field by clicking on the topmost row of the worksheet grid.

SUBMIT TO OPM

When you've completed your work, click "SUBMIT" on the "RIP Worksheet" tab, top menu bar.

Notify your budget analyst when you submit and again if you make changes.

RIP ROSTER FIELDS

Name	from Roster
Class Title	from Roster
Duty Type	Crosswalk from Class Code – Direct Care, Hazardous Duty or Normal
Program/Service Area	User pick – from user define Program/Service Area table
Location	Crosswalk from CORE Employee record
Duties or Services Performed	User input
Retirement Date	User input
FY2010 $avings	Calculated by ADS – User input for Part Time positions
FY2011 $avings	Calculated by ADS – User input for Part Time positions
Longevity	User input – enter for 1 year, they'll be the same for both
Bargaining Unit	from Roster
Fund	from Roster
SID	from Roster
Employment Type – FT/PT	from Roster
Employee #	from Roster - hidden
PCN	from Roster – hidden
Agency	from Roster - hidden