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Personnel



**AIR RESERVE TECHNICIAN (ART)
OFFICER-EXTENSION TO MANDATORY
SEPARATION DATE (MSD)**

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

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OPR: HQ AFRC/DPCC (Mr. Donnie Powell)

Certified by: HQ AFRC/DPC (Mr. Jack L. Culpepper, Jr.)

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This instruction implements AFRCPD 36-2, *Retention Policy for Air Reserve Technician (ART) Officers*. It provides the responsibilities and procedures for administering extension beyond the normal military MSDs for ART officers according to Title 10, U.S.C., Section 14702(a), whether under the Civil Service Retirement System (CSRS) or the Federal Employees Retirement System (FERS). The responsibilities and procedures outlined herein apply to all ART officers, organizations to which ART officers are assigned, and to their servicing military personnel flight (MPF) and civilian personnel flight (CPF).

SUMMARY OF REVISIONS

This revision adds minimum retirement age (MRA) as determined by birth year (para 1.2.2.1 through 1.2.2.13) for FERS ART officers. It also clarifies when individual may request MSD extension (para 2.5 and 2.7). Paragraph 2.9 changes references from statutory tour to extended active duty and redefines when ART officers may request MSD extension. Paragraph 4 adds MPF responsibility to notify ARPC of MSD. Paragraph 5.1 deletes “nationwide” concerning which non-ART positions within the Air Force HQ AFRC/DPCC registers in the DoD Priority Placement Program (PPP) when employee is one year before MSD. Paragraph 6.1 adds the Secretary of the Air Force as authority for approval or disapproval of MSD extension of general officers, as appropriate. Paragraph 6.5 deletes “Optional” from wing, group, detached squadron commander, and numbered air force commander responsibilities and procedures. Paragraph 6.6.2 includes means of informing CPF about service computation date (SCD). Paragraph 6.6.8 defines purpose for providing MSD notification by the MPF to the CPF. Paragraph 6.6.9 (added) defines requirement for the timely MSD notification by the MPF to the CPF. Paragraph 6.6.10 adds the responsibility for the MPF to notify the ART officer of approved or disapproved MSD, as appropriate. Paragraph 6.6.11 adds the MPF responsibility to notify ARPC/DPPRS if an ART leaves during an “extended MSD.” Paragraph 6.7.1 redefines the verification requirement of SCD as requested by the MPF. Paragraph 6.7.4 (added) states the CPF responsibility to ensure proposed separation notice is given to the employee. Paragraph 6.7.5 (added) states the requirement of separation on the MSD. Paragraph 7

(added) prescribes revised AFRC Form 121, **Air Reserve Technician (ART) Program Certificate of Understanding**, which adds two statements of understanding of the employee requesting extension of his or her MSD. All references to AFRES have been changed to AFRC throughout the publication, as appropriate. Revision also clarifies filing of employees' records, including forwarding to the AFPC for filing.

1. Civil Service Retirement Milestones. Retirement eligibility following MSD separation is generally based on Office of Personnel Management (OPM) rules for discontinued service retirement (DSR); i.e., involuntary separation and age 50 with 20 years of creditable service or any age with 25 years of creditable service. (*NOTE: Only OPM is authorized to approve or disapprove retirement applications.*)

1.1. CSRS. CSRS employees may request MSD extension to age 55 with 20 years of service. When the CSRS DSR retiree separates before the age of 55, OPM regulations require an annuity reduction of 2 percent for each year under age 55. This reduction is a permanent reduction. Extending to age 55 ensures that the ART officer's annuity will not be reduced due to age. If the ART chooses not to request an extension of his or her MSD, the ART may be eligible for DSR (50/20, or any age/25), but the annuity will be reduced if the ART is under age 55.

1.2. FERS:

1.2.1. Military reserve technician retirement. Special rules for military reserve technicians allow FERS ARTs who are involuntarily separated from technician service and are at least age 50 with 25 years of service to receive an immediate annuity and an immediate annuity supplement.

1.2.2. Discontinued service retirement (DSR). ARTs retiring with entitlement to a DSR annuity (50/20, or any age/25) are eligible for an immediate, unreduced annuity but will not be able to receive the annuity supplement until they reach their minimum retirement age (MRA). The MRA is a sliding age (age 55 to 57) which is based on year of birth as follows:

- 1.2.2.1. Before 1948, 55 years.
- 1.2.2.2. 1948, 55 years and 2 months.
- 1.2.2.3. 1949, 55 years and 4 months.
- 1.2.2.4. 1950, 55 years and 6 months.
- 1.2.2.5. 1951, 55 years and 8 months.
- 1.2.2.6. 1952, 55 years and 10 months.
- 1.2.2.7. 1953 through 1964, 56 years.
- 1.2.2.8. 1965, 56 years and 2 months.
- 1.2.2.9. 1966, 56 years and 4 months.
- 1.2.2.10. 1967, 56 years and 6 months.
- 1.2.2.11. 1968, 56 years and 8 months.
- 1.2.2.12. 1969, 56 years and 10 months.
- 1.2.2.13. 1970 and after, 57 years.

1.2.3. ART officers. ART officers under FERS may request MSD extension to the earlier of the 55th birthday with 25 years of service (55/25) or MRA (55-57) with 20 years of service (MRA/20), whichever occurs first (see paragraph 2.2). If the ART chooses not to request an extension of his or her MSD, the ART may be eligible for DSR (50/20, or any age/25), but receipt of the annuity supplement is delayed if he or she has not reached his or her MRA.

1.2.4. Optional reduced retirement. FERS employees are eligible to retire at their MRA with as little as 10 years of creditable service (MRA/10). Annuities are reduced 5 percent for each year the employee is under age 62. The reduction is a permanent reduction.

2. Requests for MSD Extension:

2.1. Under CSRS, AFRC will consider requests for MSD extension beyond age 55, but not to exceed age 60, only in cases when the individual does not have enough creditable years of service to retire with an immediate annuity but could obtain 20 years before reaching age 60. An exception is described in paragraph 2.7.

2.2. Under FERS, individual may request MSD extension to the earlier of the 55th birthday with 25 years of creditable service or MRA (55-57) with 20 years of service (MRA/20), whichever occurs first. Either combination will meet the eligibility for an annuity supplement. He or she may not request MSD extension to 55/25 if it is later than MRA/20. Those under FERS who cannot attain 20 years creditable service before reaching age 60 may request MSD extension to MRA/10 provided they could attain 10 years creditable service by age 60.

2.3. An individual may request extension in increments (that is, annually, biennially, etc.). Extension will be of sufficient duration so as to permit 1 year's registration in the Department of Defense (DoD) Priority Placement Program (PPP).

2.4. AFRC will not approve extension requests for those who are subject to separation for reasons within their control as outlined in AFRESI 36-114, *Procedures on Air Reserve Technicians (ART) Who Lose Active Membership in the Reserve*.

2.5. Normally, individuals may request an extension if they are within 24 months of their MSD. ART officers may submit a request for extension up to 60 days before MSD, as long as there is no adverse impact on an individual already selected for the position. ARTs may request MSD extension upon permanent assignment to GS-15 ART officer position.

2.6. ART officers assigned to 0-5 (or below) authorizations who pin on 0-6 are voluntarily providing a basis for AFRC to disapprove a request to extend their MSD.

2.7. MSD Exceptions. The AFRC Commander (CC) or Vice Commander (CV) may make individual case-by-case exceptions based on the needs of AFRC. In addition, due to recruitment problems, retention problems, needs of AFRC, critical nature of the positions, etc., the AFRC/CC or CV may, as contingencies of the service dictate, identify certain ART officer occupations or groups of positions and consider requests for extension of occupants of such positions to age 60, regardless of the number of years of creditable civil service required or possessed by the individual. AFRC normally announces such occupation/group exceptions by e-mail/message and rescinds when needs of the command are met.

2.8. Prior Military Service Credibility. Many ART officers have prior military service that is potentially creditable toward retirement eligibility, but can only be officially credited when the employee

makes required deposit to the civilian retirement system (that is, all employees covered by FERS and those employees covered by CSRS on or after 1 Oct 82). For these officers, AFRC policy is to consider approving MSD extension only to the appropriate dates using potentially creditable military service.

2.9. Extended Active Duty (EAD). ART officers may request MSD extension upon official selection for EAD if within 5 years of their MSD. If the ART officer fails to return to the ART program, AFRC adjusts the extended MSD to coincide with the later of the normal MSD or the date they separate from the military tour. Within 12 months of the regular or extended MSD, HQ AFRC/DPCC registers the ART officer on EAD in the PPP in keeping with the provisions of this instruction. To the extent possible, AFRC treats ART officers on EAD the same as ART officers not on tour.

3. Termination of MSD Extension:

3.1. With the AFRC Vice Commander's written approval, commanders may involuntarily terminate an extension (with employee being subject to separation as an ART officer) if the individual engages in misconduct, substandard performance, etc., provided the commander properly documents the reserve record and follows due process. The individual will receive written notice of the proposed termination of the extension and be provided an opportunity to respond in writing prior to a final decision being made.

3.2. AFRC will not consider voluntary requests for termination of approved extension except in extraordinary situations. (**NOTE:** Requests to curtail an extended MSD follow the same procedures used in requesting the MSD extension. In addition, ART officers should provide written justification for requesting the earlier MSD, and include the following statement in their request: "If AFRC approves my request to terminate an extended MSD, I hereby voluntarily waive my eligibility for one full year's registration in the DoD Priority Placement Program (PPP).")

4. Adjusted MSD Extension. For individuals with extended MSD who subsequently leave the ART program for any reason (except for active military service) before reaching their extended MSD, AFRC will adjust their MSD to coincide with the later of their normal MSD or the date of such voluntary separation from the ART position. The MPF will notify ARPC to adjust the MSD accordingly. (**NOTE:** Those on EAD may retain their extended MSD only as long as they have restoration rights to an ART officer position.)

5. Conditions of Employment with MSD Extension:

5.1. One year before extended (or non-extended) MSD, HQ AFRC/DPCC registers individuals in the DoD PPP for non-ART positions within the Air Force. As a condition of an extended MSD, if no offer is received, individuals agree to separation upon reaching their extended MSD, whether in a key or non-key position.

5.2. An individual with an extended MSD continues to be subject to mobility. Normally, AFRC will not require a management directed permanent change of station move unless the individual has at least 1-year retainability.

5.3. Individuals with an extended MSD continue to be eligible for military and civilian promotion. However, accepting military promotion to colonel (O-6) when it exceeds the military grade authorized

for the ART position of assignment is considered “within the individual’s control.” When this occurs, the individual is subject to separation from his or her civilian position (see AFRESI 36-114).

6. Responsibilities and Procedures:

6.1. AFRC/CC or the Secretary of the Air Force (as appropriate). Approves or disapproves requests for extension for general officers.

6.2. AFRC/CV. Approves or disapproves requests for extension for 0-6 (colonels) and below.

6.3. HQ AFRC/DP:

6.3.1. Develops and maintains procedures to process requests for extension.

6.3.2. Serves as the headquarters office of primary responsibility (OPR) for processing requests through command level channels.

6.4. HQ AFRC/DPCC. Registers all ART officers in DoD PPP 12 months prior to MSD (both extended and unextended).

6.5. Wing, Group, and Detached Squadron Commander, and Numbered Air Force Commander:

6.5.1. Reviews and recommends approval or disapproval on individual requests for extension to MSD. Ensures Reserve unit personnel record group and other performance and conduct records support recommendation for approval or disapproval.

6.5.2. Provides comments to support recommended action and forwards to the next higher level.

6.6. Servicing MPF:

6.6.1. Twenty-four months before the ART officer’s MSD, prepares memorandum of notification/election (attachment 1) to the ART officers who require an extension in order to qualify for the milestones in paragraph 1.1 (CSRS) or paragraph 1.2.3 (FERS). The employee must return the memorandum of notification/election to the MPF with an annotation/endorsement as to whether the individual elects to request an extension or declines to do so.

6.6.2. Informs (for example, via e-mail) the servicing CPF who verifies the service computation date (SCD) required from the individual’s civilian personnel files.

6.6.3. Provides an information copy of the notification/election letter to the servicing CPF.

6.6.4. Files one copy of the notification letter in the individual’s field personnel record group.

6.6.5. Reviews requests for extension from individual ART officers to ensure the requests meet procedure and documentation requirements.

6.6.6. Obtains reserve brief “SURF” (BRD001) and attaches to the request.

6.6.7. Provides completed requests to the unit commander for processing through channels (to HQ AFRC/DPCC). Includes any disciplinary/adverse information maintained in military record group.

6.6.8. Provides completed, signed copy of employee’s request for MSD extension (that is, signed copy of **Memorandum of Request for Extension of MSD** (attachment 2), and AFRC Form 121, **Air Reserve Technician (ART) Program Certificate of Understanding**), to the CPF for filing (or forwarding to AFPC for filing) in official personnel folder (OPF).

- 6.6.9. Sixty days prior to MSD (usually when processing ART officer's application for reserve retirement) MPF notifies CPF that MSD is within 60 days. (This helps ensure CPF prepares timely proposed separation notice.)
- 6.6.10. Provide copy of approved or disapproved MSD extension to the ART officer.
- 6.6.11. If an ART leaves during "extended MSD," notify ARPC/DPPRS, who will adjust MSD according to paragraph 4.
- 6.7. CPF Servicing ART Officers:
- 6.7.1. As requested by MPF, verify retirement SCD.
- 6.7.2. Provide management advisory service to AFRC unit commanders.
- 6.7.3. File (or forward to AFPC) completed and signed copy of employee's request for MSD extension (that is, signed copy of attachment 2 and AFRC Form 121) in the OPF.
- 6.7.4. Ensure proposed separation notice is completed and delivered to ART officer at least 30 days (preferably 45-60 days) before his or her MSD, and complete any necessary follow-up action. Copies of all notices must be coordinated with HQ AFRC/DPCE according to the AFRES Supplement to AFI 36-704, *Discipline and Adverse Actions*.
- 6.7.5. If not placed earlier, effect separation from civilian portion of ART position on the later of the MSD, the expiration of 12 month PPP registration, or the 30-day notice period. (*NOTE*: AFRC policy is that ART officers are separated on their MSD. For example, extensions until the end of the pay period or end of month are not appropriate.)
- 6.7.6. File (or forward to AFPC for filing) appropriate documents in employee's OPF.
- 6.8. ART Officers:
- 6.8.1. Submit individual request for extension or decline to do so (attachment 2). Employee must document either option (that is, attachment 2 completed and signed by the ART officer).
- 6.8.2. Assure request includes name, social security number, date of birth, SCD, retirement system (CSRS or FERS), current military grade, authorized military grade, current civilian grade, civilian title, current Air Force Specialty Code, current MSD, date to which extension is requested, unit of assignment, etc. (see attachment 2).
- 6.8.3. Provide a copy of current signed AFRC Form 121 with request for extension.

JAMES E. SHERRARD III, Maj Gen, USAF
Commander

Attachment 1

SAMPLE MEMORANDUM OF OPTION TO REQUEST FOR EXTENSION OF MSD

MEMORANDUM FOR

FROM:

SUBJECT: Option to Request Extension of Mandatory Separation Date (MSD)

1. Your personnel records indicate that you will reach your military MSD on _____ at which time you will be _____ years old and will have _____ years of creditable service for civilian retirement. The two civilian retirement programs are the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS). Under the existing civil service regulations, (a) you will not be entitled to an immediate annuity without a reduction because you are under age 55 (CSRS), or (b) you will not be entitled to the annuity supplement (FERS) due to being less than your minimum retirement age (MRA) (e.g., 55-57 years old) and 20 years of service (MRA/20), (c) at age 55, you will not be entitled to the annuity supplement (FERS) due to not having 25 years of service, or (d) you will not be entitled to an optional reduced retirement (MRA/10) with 5 percent reduction for each year under age 62 (FERS).
2. According to the provisions of AFRCI 36-201, you may request an extension of your MSD to (a) 55/20 (CSRS); (b) the earlier of MRA/20 or 55/25 (FERS); or (c) MRA/10 (FERS), as long as you can attain the appropriate years of service before age 60. Additionally, your military performance and conduct must justify continuation in a duty status.
3. If you desire to apply for extension of your MSD, complete the attached request, sign, and return it to the MPF not later than _____.
4. If you do not desire to apply for extension of your MSD, complete paragraph 2 of the attached request by entering your initials in the block, signing the memorandum, and returning it to the MPF not later than _____.
5. We will be glad to assist you in the submission of your request for extension. Contact us at extension _____.

(Signature)

UNIT DP/MPF CHIEF

Attachment:

Memorandum of Request for Extension of MSD

Attachment 2

SAMPLE MEMORANDUM OF REQUEST FOR EXTENSION OF MSD
MEMORANDUM FOR

FROM:

SUBJECT: Request for Extension of Mandatory Separation Date (MSD)

- 1. I request extension of my MSD.
 - a. NAME: _____
 - b. SSAN: _____
 - c. DATE OF BIRTH: _____
 - d. SERVICE COMPUTATION DATE: _____
 - e. RETIREMENT SYSTEM (CSRS OR FERS): _____
 - f. MILITARY GRADE: (CURRENT) _____ (AUTHORIZED) _____
 - g. PERMANENT CIVILIAN TITLE/SERIES/GRADE: _____
 - h. IF OCCUPYING AIRCREW POSITION, LIST DATE LAST FLEW: _____
 - i. CURRENT MILITARY MSD: _____
 - j. DATE TO WHICH EXTENSION IS REQUESTED: _____

(NOTE: For those under CSRS, this should be 55/20 and for those under FERS, this should be the earlier of 55/25 or MRA/20.)

- k. UNIT/WING OF ASSIGNMENT/LOCATION: _____
- l. A COPY OF A CURRENT AND SIGNED AFRC FORM 121 IS ATTACHED.
- m. ADDITIONAL COMMENTS, IF ANY: _____

n. AS A CONDITION OF THIS EXTENSION, I ACCEPT THAT IF I DO NOT RECEIVE A JOB OFFER, I WILL BE SUBJECT TO SEPARATION FROM MY AIR RESERVE TECHNICIAN (ART) POSITION—BOTH CIVILIAN AND RESERVE—AT THE END OF THE EXTENSION (UNLESS I LOSE RESERVE STATUS PRIOR TO THAT DATE) (REFERENCE AFRES INSTRUCTION 36-114). I ALSO UNDERSTAND AND ACCEPT THAT IF I LEAVE THE ART PROGRAM FOR ANY REASON (EXCEPT FOR ACTIVE MILITARY SERVICE) BEFORE REACHING THE EXTENDED MSD, AFRC/ARPC WILL ADJUST THE MSD TO COINCIDE WITH THE LATER OF THE NORMAL MSD OR THE DATE OF SUCH SEPARATION FROM THE ART PROGRAM.

- o. DSN: _____
- p. E-MAIL ADDRESS: _____

2. This is/is not (circle one) a request for MSD extension beyond the normal AFRC policy date, which is:

a. For those under Civil Service Retirement System (CSRS)--age 55 with 20 years of service (55/20).

b. For those under the Federal Employees Retirement System (FERS)--either 55/25 or their Minimum Retirement Age (MRA) with 20 years (MRA/20), whichever is earlier.

As a condition of this extension beyond the normal AFRC policy date, I understand and Accept that my registration in the Priority Placement Program (PPP) MAY BE DISCONTINUED UNTIL WITHIN 12 MONTHS OF NEW MSD (AS LONG AS I MEET PPP REGISTRATION REQUIREMENTS) and that I will be subject to separation from my ART position upon attaining my new, extended MSD. JUSTIFICATION FOR REQUESTING EXTENSION BEYOND NORMAL AFRC POLICY

DATE: _____

3. I do not desire to request an extension of my MSD. _____

(INITIALS)

(SIGNATURE) (DATE)

Attachments:

- 1. AFRC Form 121
- 2. Reserve Brief "SURF"