FRTIB Onboarding Checklist

This Onboarding Checklist was created to enhance your entrance experience to the FRTIB and acclimation to the agency. As such this checklist is for your use only and does not need to be returned to the agency. This checklist is not auditable.

Please note, some of the links in this checklist will only work within the FRTIB network.

	✓	Action	Link	Owner(s)
BEFORE ARRIVAL				
1	☐	Completes and returns applicable Entrance on Duty new hire forms prior to EOD.	Link will be sent through USAJobs to your profile	Employee
2	☐	Insurance: Determines eligibility and reviews available programs.	https://www.opm.gov/healthcare-insurance/Guide-Me/New-Prospective-Employees/	Employee
3	☐	Suitability Processing / Background Investigation Employee may be contacted to complete additional forms via the NIMBIS system. Note: This does not apply if employee already completed the appropriate background investigation. When scheduled for a PIV card appointment please review the "Acceptable Forms of Identification" document in advance of your appointment.	N/A	ORM-BCSD / Employee

	✓	Action	Link	Owner(s)
DAY 1				
1	☐	Attends New Employee Orientation (NEO) Orientation for new employees covers a variety of topics: **Privacy Briefing **Personnel Briefing & Issuance of Fobs and Badges **EEO Briefing **Information Security Briefing **Issuance of Office Keys **Tour and Respective Program Area Topics	N/A	ORM-HR / Employee
2	☐	If employee is a transfer from another agency, employee must provide the servicing HR office with a copy of the last Leave and Earnings Statement from the losing agency so leave balances can be transferred. In addition, employee contacts the Benefits Specialist regarding FSA, LTC, TSP Loan(s).	N/A	ORM-HR / Employee
3	☐	After orientation, completes the next step in badging process, if applicable.	N/A	ORM-BCSD / Employee

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	✓	Action	Link	Owner(s)
WITHIN WEEK 1				
	✓	**Action**	**Link**	**Owner(s)**
1	☐	Discusses work schedules and completes Telework Agreement Application form, if applicable. Sends completed form to Telework Program Manager.	[Human Capital Programs (sharepoint.com)](#)	Employee / Supervisor and/or Telework Program Manager
2	☐	Discusses work schedules and completes Alternate Work Schedule (AWS) form, if applicable. Sends completed AWS form to Benefits Specialist.	[Human Capital Programs (sharepoint.com)](#)	Employee / Supervisor and/or Benefits Specialist
BEFORE THE END OF WEEK 2				
	✓	**Action**	**Link**	**Owner(s)**
1	☐	Reviews list of mandatory training requirements for all employees.	[Workforce Development and Analytics Branch (sharepoint.com)](#)	Employee
2	☐	Verifies time card in QuickTime.	[Quicktime Quicktime Login (doi.gov)](#)	Employee
3	☐	Enrolls in the transportation subsidy program, if applicable.	[Mission Support Branch (sharepoint.com)](#)	Employee / ORM-MOD
BEFORE THE END OF WEEK 3				
	✓	**Action**	**Link**	**Owner(s)**
1	☐	Reviews Leave and Earning Statement (LES) in Employee Express.	[Welcome to Employee Express - Employee Express](#)	Employee

	✓	Action	Link	Owner(s)
WITHIN 30 DAYS				
	✓	**Action**	**Link**	**Owner(s)**
1	☐	Establishes Individual Development Plan (IDP) (must be finalized within 30 days of entrance on duty).	[frtib.sumtotal.host/Broke](#)	Supervisor / Employee
2	☐	Establishes performance standards (must be finalize within 30 days of entrance on duty).	[USA Performance® - Login Page (opm.gov)](#)	Supervisor / Employee
3	☐	Reviews Personnel Action in eOPF.	[EHRI Electronic Official Personnel Folder (opm.gov)](#)	Employee
4	☐	If you are a filer, completes the OGE 450 form and submits to OGC.	[N/A](#)	Employee / OGC
5	☐	Enrolls in and completes CUI training in Oasis	[https://frtib.sumtotal.host/](#)	Employee
6	☐	Enrolls in FRTIB 101 training (offered multiple times per year).	Provided When Available	Employee
7	☐	Enrolls in TSP Overview for Board Employees (offered 3 times a year).	Provided When Available	Employee

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	✓	Action	Link	Owner(s)
WITHIN 60 DAYS				
1	☐	Deadline to enroll in a health plan. More information found at: https://www.opm.gov/healthcare-insurance/healthcare/ • Submits form (SF-2809) to the Benefits Specialist		Employee
2	☐	Deadline to enroll in a dental and/or vision plan. More information found at: https://www.opm.gov/healthcare-insurance/dental-vision/ • Enrolls through BENEFEDS website	https://www.benefeds.com/	Employee
3	☐	Deadline to enroll in a Flexible Spending Account. More information found at: https://www.opm.gov/healthcare-insurance/flexible-spending-accounts/ • Enrolls through FSAFEDS website	https://www.fsafeds.com/	Employee
4	☐	Deadline to enroll in life insurance. More information found at: https://www.opm.gov/healthcare-insurance/life-insurance/ • Submits form (SF-2817) to the Benefits Specialist		Employee
5	☐	Reviews Long Term Care (LTC) Features and Options NOTE: Before 60 days application is abbreviated. After 60 days application process is more in-depth.	https://www.ltcfeds.com/	Employee
6	☐	Enrolls in and completes Records Management training in OASIS	https://frtib.sumtotal.host/	Employee
7	☐	Enrolls in and completes No Fear Act training in OASIS	https://frtib.sumtotal.host/	Employee
WITHIN 90 DAYS				
1	☐	Completes a Thrift Savings Plan (TSP) election form. More information found at: https://www.opm.gov/retirement-services/my-annuity-and-benefits/thrift-savings-plan/ • Submits election form to the Benefits Specialist		Employee
2	☐	Enrolls in and completes Ethics training. OGC will contact the new employee to schedule.	N/A	Employee / OGC
3	☐	Enrolls in and completes FRTIB supervisory training, if applicable.	https://frtib.sumtotal.host/	Employee

APPENDIX A
In-Processing Forms Checklist

| Federal Retirement Thrift Investment Board (FRTIB) |
| 77 K Street NE, Ste 1000, Washington D.C. 20002 |

This checklist will assist you in completing the necessary forms for your onboarding or transfer to the FRTIB.

The section of the checklist is applicable to:
- New to the federal government (includes reinstatement) -
NOTE: If you have prior federal service please alert your HR Specialist.

SF 2823 Designation of Beneficiary FEGLI

SF 3102 Designation of Beneficiary FERS
The above two forms are required if your decision differs from the natural order of precedence.

SF 2809 Health Benefits Election Form

SF 2817 Life Insurance Election FEGLI

TSP 1 Thrift Savings Plan Election Form

TSP 3 Thrift Savings Plan Designation of Beneficiary (unfillable PDF)

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Do you have a Federal Flexible Spending Account?
If yes, when you change agencies (i.e., transfer from Department of the Army to FRTIB) you will need to notify the Federal Flexible Spending Account with the following information:

   * Name of new employing agency: Federal Retirement Thrift Investment Board
   * New agency payroll identification number: 26-14-0001
   * Effective date of Transfer _____

You may contact an FSAFEDS Benefit Counselor toll-free at 1-877-FSAFEDS (372-3337), (TTY: 1-800-952-0450), Monday through Friday, 9:00 AM until 9:00 PM, Eastern Time. Please be advised that there may be payroll allotments missed due to the transfer. In this case future allotments will be increased throughout the Benefit Period to ensure you meet your annual election.

Are you enrolled in the Federal Employees Dental and Vision Insurance Program (FEDVIP)?
If so, when you change agencies you must provide the following information to insure your coverage does not lapse.

   * Name of new employing agency: Federal Retirement Thrift Investment Board
   * New agency payroll identification number: 26-14-0001
   * Effective date of Transfer _____

You may either update this information yourself online at www.BENEFEDS.com or by contacting customer service at 1-877-888-FEDS (3337) or TTY 1-877-889-5680. Customer Care Consultants are available Monday through Friday from 9:00 am to 7:00 pm Eastern Time.

Do you have a TSP Loan or making TSP Catch Up Contributions?
If so, you must immediately notify this office to insure your TSP loan payments and catch up contributions continue. The Financial Liaison Center only re-initiates TSP loans. In order to do so, you must submit a copy of the Verification of Account (TSP-19). You will also need to provide your loan account number and payment amount. If the FRTIB has a different pay cycle from your current agency, you should reamortize your loan to avoid being in default.

Other miscellaneous information for transfers:
It is recommended you provide a copy of last leave and earnings statement (LES) (Transfer eligible only) dated the Saturday prior to the effective date of the FRTIB appointment.

Rehires must provide last LES prior to separation or SF 1150.