

Pursuant to Executive Order 14058 (December 13, 2021)
on *Transforming Federal Customer Experience and
Service Delivery to Rebuild Trust in Government*

2023 HISP CX Action Plan

Retirement Services

As a High Impact Service Provider (HISP), RS focuses on service assessments, collecting customer feedback, and making measured improvements for two designated services:

- 1) Applying for Federal Civilian Retirement:** Each year, RS receives and adjudicates approximately 100,000 retirement annuity applications. Many Federal employees, retirees, and their families rely on these annuities for financial security.
- 2) Managing a Federal Retirement Account:** There are approximately 2.7 million federal annuitants. RS provides a self-service portal for these annuitants, where they can manage their retirement accounts by viewing annuity payment statements, annual notices, life insurance selections, and tax documents, and can change their contact data, direct deposits, and tax withholdings.

What we delivered in 2023:

- **Published a Retirement Quick Guide, a one-stop shop retirement resource**
OPM published a Retirement Quick Guide, a plain-language document consolidating information from 15 separate resources and webpages into a single primer. The guide provides critical information to the ~100,000 Federal employees applying for retirement each year, helping them to understand application processes and payment timelines.
- **Launched an Online Retirement Application pilot**
OPM piloted an Online Retirement Application that allows prospective retirees from selected agencies to apply for retirement payments digitally rather than on paper, enabling RS to address pain points before scaling. When fully implemented, the Online Retirement Application is expected to reduce errors and processing time for retirement applicants.
- **Developed videos explaining using Login.gov to access online RS services**
OPM launched videos on its website that explain to annuitants how to use login.gov to access their online retirement account on RS' online portal, Services Online. RS created these videos to make it easier for the approximately 2.7 million retirees to access Services Online through Login.gov and reduce RS call center wait times.
- **Improved the user interface of Services Online**
RS removed unnecessary and inaccurate notifications that caused confusion for users of Services Online. Before this change, retirement applicants were presented information that was still being adjudicated and therefore not final, which created confusion. This change enables the approximately 2.7 million active annuitants, survivors, and their families to more easily use online retirement accounts, without distracting, unnecessary notifications.

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What we commit to deliver in 2024:

- **Develop a digital file system minimal viable product for retirement applications**

OPM will develop a digital file system for the digital retirement applications submitted through the Online Retirement Application. Processing and storing retirement applications electronically would eliminate the need for RS to print and organize these applications, thereby freeing up staff time to further assist annuitants and prospective annuitants.

- **Implement improved navigation and content on Services Online**

OPM will implement further updates to the navigation, screen content, and overall presentation of Services Online addressing customer pain points. These changes include sending a welcome email encouraging annuitants to use the online portal and posting an electronic copy of a personalized annuity booklet on Services Online.