

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

2024 HISP CX Action Plan

Retirement Services

As a High Impact Service Provider (HISP), RS focuses on improving customer experience and delivery for the following 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 will deliver in 2025:

- **Improve the Online Retirement Application based on analysis of previous year's pilot**

RS will improve its Online Retirement Application based on lessons learned through its pilot launched in 2023, discussions with the human resources professionals who process these applications, and feedback from applicants. From the analysis of these results, additional improvements are expected to improve the customer experience for prospective federal retirees to fill out their retirement application. When fully implemented, the Online Retirement Application is expected to reduce errors and processing time for the approximately 100,000 retiree applications each year.

- **Complete the development of a preliminary version of a Digital File System**

RS will complete the development of the Digital File System (DFS) designed to store Federal retiree case files. By September 2025, RS will test and determine whether this first version of the DFS makes it possible for OPM staff to process and store applications electronically, rather than on paper. Once the full version of the DFS is launched, it will provide a unified view of retirement data across the retirement journey granting secure access to case information across organizations and physical locations. The system will digitally store and process approximately 100,000 retirement applications, along with associated documents per year.

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

2024 HISP CX Action Plan (Page 2)

Retirement Services

What we will deliver in 2025:

- **Make personalized retirement benefits booklets available electronically**

RS will make personalized retirement benefits booklets available electronically via Services Online, the website that federal retirees go to manage their benefits. These booklets will reflect the latest changes to a customer's account and provide personalized explanations of benefits. RS will roll out the booklet in batches, first for annuitants who request a duplicate copy of their booklet and the second for new annuitants who will be receiving their initial copy of the booklet.