



Reserve FTS Information Bulletin

Blended Retirement System (BRS) Opt-In Guidance

**FIVE-STEP
BLENDED RETIREMENT SYSTEM (BRS)
CHECKLIST TO SUCCESS**

<input type="checkbox"/> STEP 1	<input type="checkbox"/> STEP 2	<input type="checkbox"/> STEP 3	<input type="checkbox"/> STEP 4	<input type="checkbox"/> STEP 5
Determine your eligibility .	Take the mandatory BRS Opt-In Course .	Educate yourself on the BRS and use the BRS Calculator to analyze your estimated benefits.	Schedule an appointment to consult your installation personal financial manager/counselor.	Make your decision between January 1, 2018 and December 31, 2018.

www.militarysaves.org

We are 32 days away from the implementation date for the new Blended Retirement System (BRS). Members eligible to “opt-in” to the new system may begin to do so starting on 01 January 2018.

In order to opt-in, members will need to submit a request in Direct Access between January 1 and December 31, 2018. A copy of the procedures needed to successfully submit a request in Direct Access, and track the status of the request, are attached to this Bulletin. ***Opt-In functionality will not be available in Direct Access until January 1, 2018.***

NOTE: As announced in ALCOAST 345/17, Direct Access ***WILL*** be available at 0001 on January 1, 2018.

Additional information, including a video showing the step by step process needed to submit an opt-in request, can be found at the Coast Guard BRS web site at: http://www.dcms.uscg.mil/our-organization/assistant-commandant-for-human-resources-cg-1/blended-retirement-system/brs_lp/


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Self Service Opt-in for Blended Retirement System (BRS)

Introduction This guide provides the procedures for Opting into the Blended Retirement System (BRS) in Direct Access. Once submitted, the request will be routed to PPC (ADV) where they will verify the member’s eligibility. If the member’s eligibility is validated, PPC (ADV) will approve the request and it will be routed to a PPC (MAS) Supervisor for final approval. If the member’s request is denied, they will be notified via email with a reason for their denial.

Note: If the member does **NOT** want to Opt-in to the BRS, they don’t have to do anything.

Procedures See below.

Step	Action
1	<p>From the Tasks column of the Employee pagelet, select the 11 More... link.</p>  <p>The screenshot shows the 'Employee' pagelet with three columns: Profile, Tasks, and View. The 'Tasks' column contains several links: PCS eResumes, My Airport Terminal Orders, Emergency Contacts, Home and Mailing Address, Phone Numbers, Allotments, Direct Deposit, Federal & State Tax Elections, All Duty Report, and 11 More... (highlighted with a red box). The 'View' column contains: My Profile, Member Training Rating, My Reserve Points Statement, My Reserve Drills, View My Payslips (AD/RSV), My Employee Reviews, Employee Review Summary, Off Comparison Scale Summary, SWE PDE, and 6 More... The 'Profile' column contains a link to Profile.</p>

Continued on next page

Self Service Opt-in for Blended Retirement System (BRS), Continued

Procedures,
continued

Step	Action
2	<p data-bbox="327 528 671 562">Select My BRS Elections.</p>  <p data-bbox="327 562 1369 1122">Main Menu > CG AD Self Service: Employee ></p> <p data-bbox="327 584 1369 618">Tasks</p> <ul data-bbox="327 640 1369 1122" style="list-style-type: none"> PCS eResumes View jobs and manage your applications. Emergency Contacts Add or update your emergency contact information. Home and Mailing Address Home and Mailing Address Allotments This link will take you to view, add, change, or stop your voluntary deductions. Direct Deposit This link will take you to view and/or change your EFT/Direct Deposit. All Duty Report All Duty Report Thrift Savings Plan Review a summary of your savings plan enrollments. My BRS Elections This contains my Blended Retirement System Elections Annual Screening Questionnaire Annual Screening Questionnaire My Assignments Endorsements My Assignments Endorsements My Email Addresses My eResume My eResume Submission Report My Panel Submissions Allows the member to apply to screening panels and advance training.

Continued on next page

Self Service Opt-in for Blended Retirement System (BRS), Continued

Procedures, continued

Step	Action
3	<p>The My BRS Elections page will display. Follow the directions on the page and answer the three questions. The BRS Entry Date will always default to the current date. The Submit button will only become active if you answer Yes to all three questions. You can click Save at any part of this process and return at a later time.</p> <div data-bbox="327 707 1369 1406" style="border: 1px solid blue; padding: 5px;"> <p>My BRS Elections</p> <p>David Beckham 1234567 Status: Not Active</p> <div style="border: 2px solid red; padding: 2px; margin: 5px 0;"> <p>You must answer all the questions below with YES in order for the enrollment to proceed. Once you have answered all the questions and select SUBMIT to enter the Blended Retirement System you will receive an email confirmation that your request is under review to ensure eligibility. Once the review of your request is complete, you will receive an email notification stating you are enrolled in the BRS or ineligible for the BRS.</p> </div> <ol style="list-style-type: none"> 1. I have completed the Blended Retirement System opt-in training and /or have acquired the necessary financial knowledge to make an informed decision to opt-in to the Blended Retirement System. I acknowledge that I am making an informed decision as it relates to my BRS election. <input type="checkbox"/> <hr/> 2. I understand that once I make the election to opt-in to the Blended Retirement System, this election cannot be changed and I will no longer be eligible for the legacy High Three Retirement System. I acknowledge that I cannot change my election once submitted. <input type="checkbox"/> <hr/> 3. I understand that this decision to Opt-In to the Blended Retirement System is effective on the date that I submit this election. I acknowledge that my election will be effective as of the date below. <input type="checkbox"/> BRS Entry Date: <input type="text" value="10/17/2017"/> <p style="margin-top: 10px;">Save Submit</p> </div> <p>Clicking Save will bring up this message. Click OK to return to the page.</p> <div data-bbox="327 1480 1369 1659" style="border: 1px solid blue; padding: 5px;"> <p>Save Confirmation</p> <p> The Save was successful. Your answers have been SAVED. You must answer all questions and SUBMIT to Opt-In to the Blended Retirement System.</p> <p style="margin-top: 5px;">OK</p> </div>

Continued on next page

Self Service Opt-in for Blended Retirement System (BRS), Continued


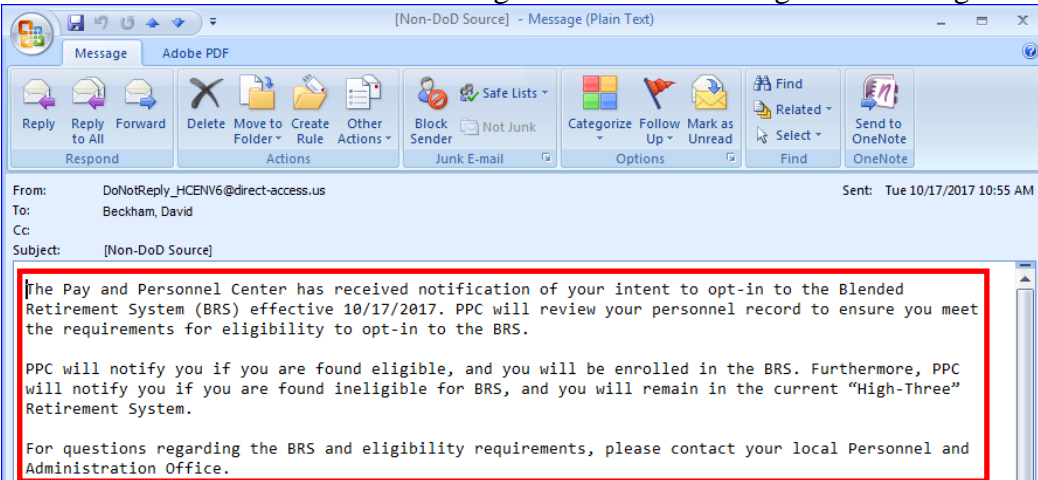
Procedures,
continued

Step	Action
4	<p>Once you have answered Yes to all three questions, click the Submit button.</p> <div style="border: 1px solid blue; padding: 5px;"> <p>My BRS Elections</p> <p>David Beckham 1234567 Status: Not Active</p> <p>You must answer all the questions below with YES in order for the enrollment to proceed. Once you have answered all the questions and select SUBMIT to enter the Blended Retirement System you will receive an email confirmation that your request is under review to ensure eligibility. Once the review of your request is complete, you will receive an email notification stating you are enrolled in the BRS or ineligible for the BRS.</p> <p>1. I have completed the Blended Retirement System opt-in training and /or have acquired the necessary financial knowledge to make an informed decision to opt-in to the Blended Retirement System.</p> <p>I acknowledge that I am making an informed decision as it relates to my BRS election. <input type="text" value="Yes"/></p> <hr/> <p>2. I understand that once I make the election to opt-in to the Blended Retirement System, this election cannot be changed and I will no longer be eligible for the legacy High Three Retirement System.</p> <p>I acknowledge that I cannot change my election once submitted. <input type="text" value="Yes"/></p> <hr/> <p>3. I understand that this decision to Opt-In to the Blended Retirement System is effective on the date that I submit this election.</p> <p>I acknowledge that my election will be effective as of the date below. <input type="text" value="Yes"/></p> <p>BRS Entry Date: <input type="text" value="10/17/2017"/></p> <p style="text-align: center;"> <input type="button" value="Save"/> <input style="border: 2px solid red;" type="button" value="Submit"/> </p> </div>

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Self Service Opt-in for Blended Retirement System (BRS), Continued

Procedures,
continued

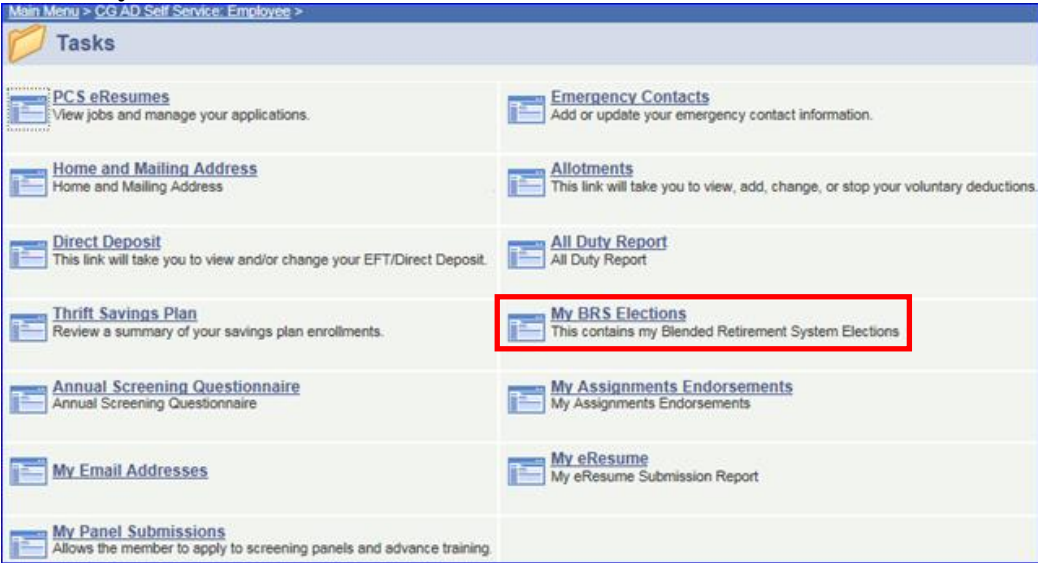
Step	Action
5	<p>Once submitted, this message will appear. Click OK.</p> <div data-bbox="327 562 1369 851" style="border: 1px solid blue; padding: 5px;"> <p>Save Confirmation</p> <p> The Save was successful.</p> <p>You have SUBMITTED your election to Opt-In to the Blended Retirement System. This election will be processed once your eligibility has been validated by the Pay & Personnel Center. You will be notified once this is processed.</p> <p>OK</p> </div> <p>The member will also receive an auto-generated email stating the following:</p> <div data-bbox="327 922 1369 1400" style="border: 1px solid blue; padding: 5px;">  </div>

Checking the Status of a BRS Opt-in Request

Introduction This guide provides the procedures for a member to check the status of their BRS Opt-in Request in Direct Access. There are two ways to check the status. Both will be shown below.

Note: This only works if the member Opted-in using Self Service in Direct Access. If they submitted a paper form, they will need to call PPC/submit a ticket to check their status.

Procedures See below.

Step	Action
1	<p>The quickest way to check the status of your BRS Opt-in request is to look in the same place the transaction was entered. From the Tasks column of the Employee pagelet, select the 11 More... link.</p>  <p>The screenshot shows the 'Employee' pagelet with a 'Tasks' column. The '11 More...' link is highlighted with a red box. Other links in the 'Tasks' column include: Profile, PCS eResumes, My Airport Terminal Orders, Emergency Contacts, Home and Mailing Address, Phone Numbers, Allotments, Direct Deposit, Federal & State Tax Elections, All Duty Report, View, My Profile, Member Training Rating, My Reserve Points Statement, My Reserve Drills, View My Payslips (AD/RSV), My Employee Reviews, Employee Review Summary, Off Comparison Scale Summary, SWE PDE, and 6 More...</p>
2	<p>Select My BRS Elections.</p>  <p>The screenshot shows the 'Tasks' pagelet with a list of tasks. The 'My BRS Elections' link is highlighted with a red box. Other links in the list include: PCS eResumes, Emergency Contacts, Home and Mailing Address, Allotments, Direct Deposit, All Duty Report, Thrift Savings Plan, My BRS Elections, Annual Screening Questionnaire, My Assignments Endorsements, My Email Addresses, My eResume, and My Panel Submissions.</p>

Continued on next page

Checking the Status of a BRS Opt-in Request, Continued

Procedures,
continued

Step	Action
3	<p>The My BRS Elections page will display. The Status will show one of the following:</p> <p>Pending (the request has been routed, but not approved/denied yet):</p> <div data-bbox="327 633 1369 1339" style="border: 1px solid blue; padding: 5px;"> <p>My BRS Elections</p> <p>David Beckham 1234567 Status: Pending</p> <p>You must answer all the questions below with YES in order for the enrollment to proceed. Once you have answered all the questions and select SUBMIT to enter the Blended Retirement System you will receive an email confirmation that your request is under review to ensure eligibility. Once the review of your request is complete, you will receive an email notification stating you are enrolled in the BRS or ineligible for the BRS.</p> <p>1. I have completed the Blended Retirement System opt-in training and /or have acquired the necessary financial knowledge to make an informed decision to opt-in to the Blended Retirement System.</p> <p>I acknowledge that I am making an informed decision as it relates to my BRS election. <input type="text" value="Yes"/></p> <hr/> <p>2. I understand that once I make the election to opt-in to the Blended Retirement System, this election cannot be changed and I will no longer be eligible for the legacy High Three Retirement System.</p> <p>I acknowledge that I cannot change my election once submitted. <input type="text" value="Yes"/></p> <hr/> <p>3. I understand that this decision to Opt-In to the Blended Retirement System is effective on the date that I submit this election.</p> <p>I acknowledge that my election will be effective as of the date below. <input type="text" value="Yes"/></p> <p>BRS Entry Date: <input type="text" value="10/17/2017"/></p> <p><input type="button" value="Save"/> <input type="button" value="Submit"/></p> </div>

Continued on next page

Checking the Status of a BRS Opt-in Request, Continued

Procedures,
continued

Step	Action
<p>3 (cont.)</p>	<p>Approved (the request has been approved):</p> <div data-bbox="327 526 1305 1182"> <p>My BRS Elections</p> <p><u>David Beckham</u> 1234567 Status: Approved</p> <p>You must answer all the questions below with YES in order for the enrollment to proceed. Once you have answered all the questions and select SUBMIT to enter the Blended Retirement System you will receive an email confirmation that your request is under review to ensure eligibility. Once the review of your request is complete, you will receive an email notification stating you are enrolled in the BRS or ineligible for the BRS.</p> <p>1. I have completed the Blended Retirement System opt-in training and /or have acquired the necessary financial knowledge to make an informed decision to opt-in to the Blended Retirement System.</p> <p>I acknowledge that I am making an informed decision as it relates to my BRS election. <input type="text" value="Yes"/></p> <hr/> <p>2. I understand that once I make the election to opt-in to the Blended Retirement System, this election cannot be changed and I will no longer be eligible for the legacy High Three Retirement System.</p> <p>I acknowledge that I cannot change my election once submitted. <input type="text" value="Yes"/></p> <hr/> <p>3. I understand that this decision to Opt-In to the Blended Retirement System is effective on the date that I submit this election.</p> <p>I acknowledge that my election will be effective as of the date below. <input type="text" value="Yes"/></p> <p>BRS Entry Date: <input type="text" value="10/17/2017"/></p> <p><input type="button" value="Save"/> <input type="button" value="Submit"/></p> </div> <p>Denied (the request has been denied):</p> <div data-bbox="327 1243 1305 1899"> <p>My BRS Elections</p> <p><u>David Beckham</u> 1234567 Status: Denied</p> <p>You must answer all the questions below with YES in order for the enrollment to proceed. Once you have answered all the questions and select SUBMIT to enter the Blended Retirement System you will receive an email confirmation that your request is under review to ensure eligibility. Once the review of your request is complete, you will receive an email notification stating you are enrolled in the BRS or ineligible for the BRS.</p> <p>1. I have completed the Blended Retirement System opt-in training and /or have acquired the necessary financial knowledge to make an informed decision to opt-in to the Blended Retirement System.</p> <p>I acknowledge that I am making an informed decision as it relates to my BRS election. <input type="text" value="Yes"/></p> <hr/> <p>2. I understand that once I make the election to opt-in to the Blended Retirement System, this election cannot be changed and I will no longer be eligible for the legacy High Three Retirement System.</p> <p>I acknowledge that I cannot change my election once submitted. <input type="text" value="Yes"/></p> <hr/> <p>3. I understand that this decision to Opt-In to the Blended Retirement System is effective on the date that I submit this election.</p> <p>I acknowledge that my election will be effective as of the date below. <input type="text" value="Yes"/></p> <p>BRS Entry Date: <input type="text" value="10/17/2017"/></p> <p><input type="button" value="Save"/> <input type="button" value="Submit"/></p> </div>

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Checking the Status of a BRS Opt-in Request, Continued

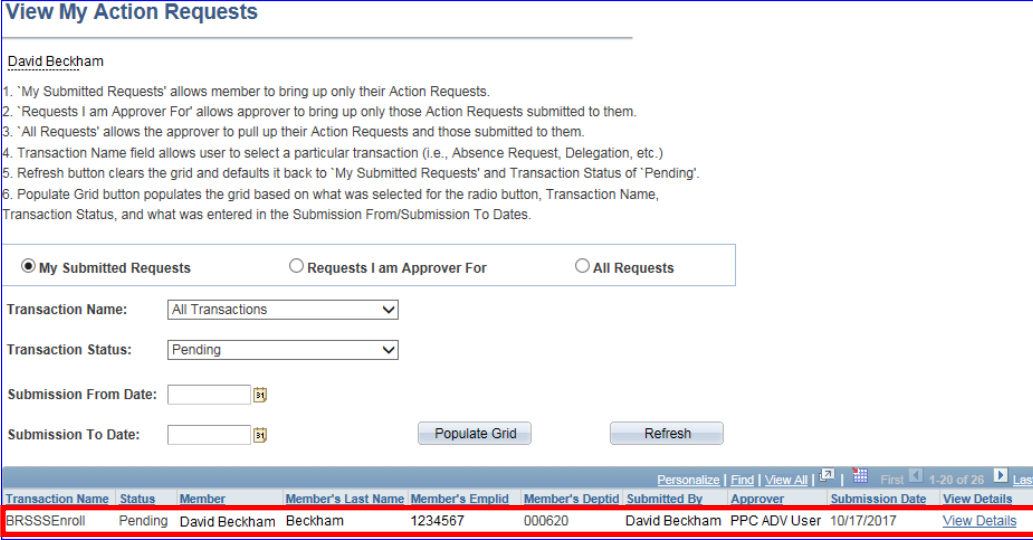
Procedures,
continued

Step	Action
<p>4</p>	<p>The other place where the status can be checked is from the Requests tab. Click View My Requests (all types).</p>  <p>The screenshot shows the United States Coast Guard Self Service Requests interface. At the top, there are navigation tabs: 'My Page', 'Self Service', and 'Requests'. The 'Requests' tab is highlighted with a red box. Below the tabs, there are links for 'Content' and 'Layout'. The main section is titled 'Self Service Requests' and contains several links: 'Submit an Absence Request', 'View My Absence Requests', 'Submit a Delegation Request', 'View My Requests (all types)', 'Submit a Drill Request', and 'User Access Request'. The 'View My Requests (all types)' link is highlighted with a red box.</p>
<p>5</p>	<p>The View My Action Requests page will display. Leave the My Submitted Requests radio button selected, enter specific parameters (if applicable), then click Populate Grid.</p>  <p>The screenshot shows the 'View My Action Requests' page for David Beckham. It includes a list of instructions: <ol style="list-style-type: none"> 'My Submitted Requests' allows member to bring up only their Action Requests. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.) Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates. Below the instructions, there are three radio buttons: 'My Submitted Requests' (selected and highlighted in red), 'Requests I am Approver For', and 'All Requests'. There are also two dropdown menus: 'Transaction Name' (set to 'All Transactions') and 'Transaction Status' (set to 'All Statuses'). At the bottom, there are two date input fields for 'Submission From Date' and 'Submission To Date', and two buttons: 'Populate Grid' (highlighted in red) and 'Refresh'.</p>

Continued on next page

Checking the Status of a BRS Opt-in Request, Continued




Procedures,
continued

Step	Action																				
6	<p>Locate the BRSSSEnroll Transaction Name and click the View Details link.</p>  <p>View My Action Requests</p> <p>David Beckham</p> <p>1. 'My Submitted Requests' allows member to bring up only their Action Requests. 2. 'Requests I am Approver For' allows approver to bring up only those Action Requests submitted to them. 3. 'All Requests' allows the approver to pull up their Action Requests and those submitted to them. 4. Transaction Name field allows user to select a particular transaction (i.e., Absence Request, Delegation, etc.) 5. Refresh button clears the grid and defaults it back to 'My Submitted Requests' and Transaction Status of 'Pending'. 6. Populate Grid button populates the grid based on what was selected for the radio button, Transaction Name, Transaction Status, and what was entered in the Submission From/Submission To Dates.</p> <p> <input checked="" type="radio"/> My Submitted Requests <input type="radio"/> Requests I am Approver For <input type="radio"/> All Requests </p> <p>Transaction Name: <input type="text" value="All Transactions"/></p> <p>Transaction Status: <input type="text" value="Pending"/></p> <p>Submission From Date: <input type="text" value=""/></p> <p>Submission To Date: <input type="text" value=""/></p> <p><input type="button" value="Populate Grid"/> <input type="button" value="Refresh"/></p> <table border="1"> <thead> <tr> <th>Transaction Name</th> <th>Status</th> <th>Member</th> <th>Member's Last Name</th> <th>Member's Emplid</th> <th>Member's Deptid</th> <th>Submitted By</th> <th>Approver</th> <th>Submission Date</th> <th>View Details</th> </tr> </thead> <tbody> <tr style="border: 2px solid red;"> <td>BRSSSEnroll</td> <td>Pending</td> <td>David Beckham</td> <td>Beckham</td> <td>1234567</td> <td>000620</td> <td>David Beckham</td> <td>PPC ADV User</td> <td>10/17/2017</td> <td>View Details</td> </tr> </tbody> </table>	Transaction Name	Status	Member	Member's Last Name	Member's Emplid	Member's Deptid	Submitted By	Approver	Submission Date	View Details	BRSSSEnroll	Pending	David Beckham	Beckham	1234567	000620	David Beckham	PPC ADV User	10/17/2017	View Details
Transaction Name	Status	Member	Member's Last Name	Member's Emplid	Member's Deptid	Submitted By	Approver	Submission Date	View Details												
BRSSSEnroll	Pending	David Beckham	Beckham	1234567	000620	David Beckham	PPC ADV User	10/17/2017	View Details												

Continued on next page

Checking the Status of a BRS Opt-in Request, Continued

Procedures,
continued

Step	Action
7	<p>The Action Request page will display. The Status will show one of the following:</p> <p>Pending (the request has been routed, but not approved/denied yet):</p> <div data-bbox="327 638 1197 1489" style="border: 1px solid blue; padding: 5px;"> <p>Action Request</p> <p>BRS Self Service Enrollment</p> <p>Beckham, David</p> <hr/> <p>Request Details</p> <p>BRS Enrollment Dt: 10/17/2017 </p> <p>Comment: <input type="text"/></p> <p><input type="button" value="Submit"/> <input type="button" value="Resubmit"/> <input type="button" value="Withdraw"/></p> <p>Certify Eligibility</p> <p>Request Status Pending</p> <p>First Approval</p> <p>Pending</p> <p> Multiple Approvers BRS Member Eligibility</p> <p>Approve for BRS</p> <p>Request Status Awaiting Further Approvals</p> <p>Final Approval</p> <p>Not Routed</p> <p> Multiple Approvers BRS Entry Approvers</p> </div>

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Checking the Status of a BRS Opt-in Request, Continued

Procedures,
continued

Step	Action
7 (cont.)	<p>Approved (the request has been approved):</p> <div data-bbox="327 526 1225 1388" style="border: 1px solid blue; padding: 5px;"> <p>Action Request</p> <p>BRS Self Service Enrollment</p> <p>Beckham, David</p> <hr/> <p>Request Details</p> <p>BRS Enrollment Dt: 10/17/2017</p> <hr/> <p>Comment: <input type="text"/></p> <hr/> <p><input type="button" value="Submit"/> <input type="button" value="Resubmit"/> <input type="button" value="Withdraw"/></p> <p>Certify Eligibility</p> <div data-bbox="391 952 1212 1131" style="border: 1px solid lightblue; padding: 5px;"> <p>Request Status Approved</p> <p>First Approval</p> <div data-bbox="406 1019 670 1120" style="border: 1px solid lightgreen; padding: 2px;"> <p>Approved</p> <p>✓ PPC ADV User BRS Member Eligibility 10/17/17 - 11:14 AM</p> </div> </div> <p>Approve for BRS</p> <div data-bbox="391 1198 1212 1377" style="border: 1px solid lightblue; padding: 5px;"> <p>Request Status Approved</p> <p>Final Approval</p> <div data-bbox="406 1265 662 1366" style="border: 1px solid lightgreen; padding: 2px;"> <p>Approved</p> <p>✓ PPC MAS Sup BRS Entry Approvers 10/17/17 - 11:18 AM</p> </div> </div> </div>

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Checking the Status of a BRS Opt-in Request, Continued

Procedures,
continued

Step	Action
<p>7 (cont.)</p>	<p>Denied (the request has been denied):</p> <div data-bbox="327 526 1308 1467" style="border: 1px solid blue; padding: 5px;"> <p>Action Request</p> <p>BRS Self Service Enrollment</p> <p>Beckham, Victoria</p> <p>Request Details</p> <p>BRS Enrollment Dt: 10/17/2017 </p> <p>Comment: Member is not eligible due to insufficient time in service.</p> <p><input type="button" value="Submit"/> <input type="button" value="Resubmit"/> <input type="button" value="Withdraw"/></p> <p>Certify Eligibility</p> <p>Request Status Denied</p> <p>First Approval</p> <div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;"> <p>Denied</p> <p> PPC ADV User BRS Member Eligibility 10/17/17 - 1:15 PM</p> </div> <p>Approve for BRS</p> <p>Request Status Denied</p> <p>Final Approval</p> <div style="border: 1px solid pink; padding: 2px;"> <p>Terminated</p> <p> Multiple Approvers BRS Entry Approvers</p> </div> </div>