

**BY ORDER OF THE COMMANDER
AIR FORCE RESERVE COMMAND**

**AIR FORCE RESERVE COMMAND
INSTRUCTION 36-201**



6 AUGUST 2015

Personnel

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

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

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This instruction implements AFD 36-1, *General Civilian Personnel Provisions and Authorities*. It provides the responsibilities and procedures for administering extensions of military mandatory separation dates (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). It applies to all ART officers, organizations to which ART officers are assigned, and to their servicing military personnel flight (MPF) and civilian personnel Section (CPS). This instruction is not Applicable to the Air National Guard (ANG). Ensure that all records created as a result of processes prescribed in this publication are maintained in accordance with Air Force Manual (AFMAN) 33-363, *Management of Records*, and disposed of in accordance with (IAW) Air Force Records Information Management System (AFRIMS) Records Disposition Schedule (RDS). Refer recommended changes and conflicts between this and other publications to the Office of Primary Responsibility (OPR) on AF Form 847, *Recommendation for Change of Publication*; route AF Form 847s from the field through the appropriate functional chain of command. The authorities to waive wing/unit level requirements in this publication are identified with a Tier ("T-0, T-1, T-2, T-3") number following the compliance statement. See AFI 33-360, *Publications and Forms Management*, for a description of the authorities associated with the Tier numbers. Submit requests for waivers through the chain of command to the appropriate Tier waiver approval authority, or alternately, to the Publication OPR for non-tiered compliance items. This publication may not be supplemented or further implemented/extended.

SUMMARY OF CHANGES

This instruction is revised and must be completely reviewed. All references to HQ AFRC/DPCS have been changed to HQ AFRC/A1CSA, references to HQ AFRC/DP changed to HQ AFRC/A1 throughout the publication. Paragraph 2.3.3 has been revised to change the time limit for submitting an extension request from 60 days to 120 days before MSD. Paragraph 2.4 has been added clarifying AFRC/CC/CV has discretion to deny an extension request or to terminate a previously approved extension. A statement has been added in Paragraph 2.5.2 clarifying MSD extension requests to age 60. Paragraph 2.5.3 has been added to provide required documents for requesting an extension. Paragraph 2.7 has been added requiring the MSD for ARTs entering EAD be checked for retainability prior to entering the EAD. Paragraph 2.7.1 has been reworded to clarify that the MSD for ARTs who go on an EAD will be adjusted to the normal MSD date (i.e., minimum retirement age (MRA) with 20 years of creditable service). Paragraph 4.1 is revised to delete “removes except military service.” Paragraph 5.1 clarifies the ART must request registration in PPP. Paragraph 5.1.1 clarifies registration in PPP is for commuting area. Paragraph 6.3 has been revised to change approval authority from NAF/CC to AFRC/CV and NAF/CC recommends approval or disapproval. MPF has been changed to FSS; CPF has been changed to CPS, and HQ AFRC/DPCE has been changed to HQ AFRC/A1CE.

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 credit-able service. AFRC’s MSD extension policies ensure that if applicable service deposits are made, the CSRS ART officer should be eligible for an unreduced annuity and the FERS ART officer should be eligible for immediate receipt of the annuity supplement. In order to obtain a civilian annuity, the ART officer must be able to attain five years of FERS or CSRS covered federal civilian service. See paragraph 1.2.1 for specific age and service requirements. (**NOTE:** Only OPM is authorized to approve or disapprove retirement applications.)

1.1. CSRS: CSRS ART officers may request MSD extension to age 55 with 20 years of potentially creditable 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 CSRS ART chooses not to request a MSD extension, 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: ART officers under FERS may request MSD extension to their minimum retirement age (MRA) with 20 years of potentially creditable service (MRA/20), (see paragraph 2.2). 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 MRA.

1.2.1. The MRA is a sliding age (age 55 to 57) which is based on year of birth as follows: Before 1948, 55 years.

1.2.1.1. 1948, 55 years and 2 months

1.2.1.2. 1949, 55 years and 4 months

- 1.2.1.3. 1950, 55 years and 6 months
- 1.2.1.4. 1951, 55 years and 8 months
- 1.2.1.5. 1952, 55 years and 10 months
- 1.2.1.6. 1953 through 1964, 56 years
- 1.2.1.7. 1965, 56 years and 2 months
- 1.2.1.8. 1966, 56 years and 4 months
- 1.2.1.9. 1967, 56 years and 6 months
- 1.2.1.10. 1968, 56 years and 8 months
- 1.2.1.11. 1969, 56 years and 10 months
- 1.2.1.12. 1970 and after, 57 years

1.2.2. If the ART chooses not to request an extension of MSD, the ART may be eligible for DSR (50/20, or any age/25), but receipt of the annuity supplement is delayed if MRA has not been reached.

1.2.3. 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. FERS ART officers who do not complete military deposits prior to MSD separation may only be eligible for this reduced annuity.

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 2.5.

2.2. Under FERS, individuals may request MSD extension to MRA (55-57) with 20 years of potentially creditable service (MRA/20), thereby meeting the eligibility for an annuity supplement. 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. Generally, individuals may request an extension after achieving 25 years of Total Federal Com missioned Service (TFCS). When warranted, extensions may be requested earlier. (For example, when individual is within two years of original MSD, but has not achieved 25 years of TFCS).

2.3.1. ARTs may request MSD extension upon permanent assignment to GS-15 ART officer position.

2.3.2. Individual may request extensions not to exceed the normal policy date in accordance with paragraphs 1.1 or 1.2 in no more than two increments (that is, annually, biennially, etc.). The requested extension will be of sufficient duration so as to permit 1 year's registration in the Department of Defense (DoD) Priority Placement Program (PPP). (See para. 5.1)

2.3.3. ART officers may submit a request for extension up to 120 days before MSD, as long as there is no adverse impact on an individual already selected for the position.

2.4. AFRC/CV must and does retain the command discretion to deny an MSD extension request (or to terminate a previously approved MSD extension) based on shifting manning decision (internally or externally imposed) or for reasons considered within their control as outlined in AFRCI 36-114, *Procedures on Air Reserve Technicians (ART) Who Lose Active Membership in the Reserve*.

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

2.5. Case-by-Case Extensions. The AFRC Commander (CC) or Vice Commander (CV) may approve individual case-by-case extensions based on the needs of AFRC. Such requests should include sufficient justification outlining the need for the unique skill of the individual and the inability to recruit/retain qualified personnel.

2.5.1. 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/memo and rescinds when needs of the command are met.

2.5.2. An amendment to 10 U.S.C. 10216(f) in December 2011 provided AFRC/CC discretion to approve or disapprove MSD extension requests to age 60. Therefore, requests beyond the normal policy date (MRA/20 or age 55/20) will be considered on a case-by-case basis IAW paragraph 2.5 above.

2.5.3. Requests for MSD extensions must include request form (see atch 1), justification from unit commander for granting or for denying the extension, signed AFRCI Form 121, Mil SURF, and current fitness report. The package is submitted through member's military chain of command to HQ AFRC/A1CSA for CV approval/disapproval.

2.5.4. AFRC/CV is approval authority on all MSD extension requests below GO level. AFRC/CC is approval authority for GO requests.

2.6. 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 deposits to the civilian retirement system (that is, all employees covered by FERS and those employees first 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 all potentially creditable military service.

2.7. Extended Active Duty (EAD). Prior to an ART officer entering on EAD, the member's normal/military MSD should be reviewed for retainability. If the member's MSD is before their EAD date of separation (DOS), they can only apply and be considered for EAD if they have at least 24 months retainability. In this case, a waiver may be requested/granted to allow nomination/selection with less than the normal 36-month retainability requirement.

2.7.1. ART officers may request MSD extension to MRA/20 upon official selection for EAD if within 5 years of their MSD. However, when the ART officer enters EAD, ARPC will adjust the extended ART MSD back to the military MSD. When the member returns to the ART program, ARPC will readjust the MSD back to the previously approved extended ART MSD.

2.7.2. Within one year of the MSD, ART officers on EAD may register in the DoD PPP in keeping with the provisions of this instruction.

3. Termination of MSD Extension:

3.1. With the AFRC Vice Commander's written approval, commanders may 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.

3.1.1. Termination of MSD extension is appropriate for ART officers who have been determined medically disqualified through no fault of their own.

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 the request and include the following statement: "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:

4.1. For individuals with extended MSD who subsequently leave the ART program for any reason before reaching their extended ART MSD, AFRC will adjust their MSD to coincide with the later of their military MSD or the date of such voluntary separation from the ART position. Individuals who voluntarily leave the ART program before reaching their extended MSD are not eligible for enrollment in the DoD Priority Placement Program (PPP). The notification to ARPC will be done by the FSS, HQ AFRC/A1L (Colonels/Colonel Selects), or other appropriate office depending upon the applicable grade of the ART officer and the reasons for the adjustment.

5. Conditions of Employment with MSD Extension:

5.1. One year before MSD, ART officers may register in the DoD PPP for non-ART positions within the Air Force. If no offer is received, individuals face separation procedures upon reaching their MSD, whether in a key or non-key position. (NOTE: Separation is on the MSD, not the end of the month.)

5.1.1. ART officers must ensure they are registered by HQ AFRC/A1CSA in the DoD PPP to avail themselves of AFRC's intent to provide them with a one-year registration period prior to their separation. Failure to be registered one year prior to a member's MSD will not extend the date of separation. The area of referral is limited to the member's local commuting area and for Air Force activities. If a member registers for

and accepts an offer to a lower-graded position, pay is set in accordance with PPP and Air Force pay setting rules.

5.1.2. Individuals declining a valid PPP offer of a position for which registered will be removed from the PPP. Individuals declining a PPP offer of a position within their commuting area for which registered may be denied DSR by OPM.

5.1.3. To avoid premature registration in DoD PPP one year prior to MSD, ART officers who plan to remain in the ART program and have not requested an extension to MRA/20 should request MSD extension to MRA/20.

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 (PCS) move unless the individual has at least one-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 "loss of the ART's required military status for a reason within the individual's control." When this occurs, the individual is subject to separation from the civilian position (see AFRCI 36-114).

6. Responsibilities and Procedures:

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

6.2. AFRC/CV. Approves or disapproves requests for MSD extension for O-6 (colonels) and below. Approves or disapproves requests to curtail or terminate approved extensions.

6.3. NAF/CCs and HQs Directors. Recommends approval or disapproval for MSD extensions.

6.4. HQ AFRC/~~DP~~ A1:

6.4.1. Develops and maintains procedures to process requests for MSD extension.

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

6.5. HQ AFRC/A1CSA.

6.5.1. Receives MSD extension requests, reviews and process for CV approval/disapproval.

6.5.2. Upon ART officer's request, registers ART officer in DoD PPP one year prior to MSD. It is the ART officer's responsibility to ensure they are registered in DoD PPP by HQ AFRC/A1CSA to avail themselves of AFRC's intent to provide them with a one-year registration period prior to their separation. Failure to be registered one year prior to MSD will not extend the date of separation.

6.5.3. Provides copy of approved or disapproved MSD extension request to ART officer and notifies ARPC of approval, as appropriate.

6.6. Wing, Group, and Detached Squadron Commander:

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

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

6.7. Servicing FSS:

6.7.1. Twenty-four months before the ART officer's MSD, prepares Memorandum of Option to Request Extension of MSD (Attachment 2) to the ART officers who require an extension in order to qualify for the milestones in paragraph 1.1 (CSRS) or paragraph 1.2 (FERS). The employee must return the memorandum to the FSS with an annotation/endorsement either electing to request an extension or choosing not to extend.

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

6.7.3. Provides an information copy of the notification/election letter to the servicing CPS.

6.7.4. Files one copy of the notification letter in the individual's Personnel Records Display Application (PRDA).

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

6.7.6. Obtains Reserve brief "SURF" (BAD002), fitness report and signed AFRC Form 121 and attaches to the request.

6.7.7. Provides completed requests to the unit commander for processing through member's chain of command up to the NAF/CSS (to HQ AFRC/A1CSA). Includes any disciplinary/adverse information maintained in military record group or civilian record.

6.7.8. Ninety days prior to MSD (usually when processing ART officer's application for Reserve retirement) FSS notifies CPFS that MSD is within 90 days. (This helps ensure CPFS prepares and coordinates timely proposed separation notice with proper offices, to include HQ AFRC/A1CE.)

6.7.9. If an ART leaves during "extended MSD," notifies ARPC/DPTTS, who will adjust MSD according to paragraph 4.

6.8. CPS Servicing ART Officers:

6.8.1. As requested by FSS, verify, or request verification from AFPC (BEST), retirement SCD, including all potentially creditable service.

6.8.2. Provide management advisory service to AFRC unit commanders.

6.8.3. Ensure proposed separation notice is completed and delivered to ART officer at least 30 days (preferably 60 to 90 days) before the MSD, and complete any necessary follow-up action. Copies of all notices must be coordinated with HQ AFRC/A1CE according to the AFRC Supplement to AFI 36-704, *Discipline and Adverse Actions*.

6.8.4. If not placed earlier through the Priority Placement Program (PPP) or through competitive sources (e.g., USAJobs), effect separation from civilian portion of ART position on the later of the MSD 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 permissible.*)

6.8.5. File (or forward to AFPC for filing) appropriate documents in employee's OPF.

6.9. ART Officers:

6.9.1. Must document desire to request an extension or decline to request extension by completing and signing **Attachment 3**, Request for MSD Extension, and submitting to the FSS. (See para.6.7.1)

6.9.2. Provide a copy of current signed AFRC Form 121 with request for extension.

6.10. ARPC/DPTTS

6.10.1. Upon receipt of approved MSD extension, adjusts ART officer's MSD to the approved date.

JAMES F. JACKSON, Lieutenant General,
USAF Commander

Attachment 1**GLOSSARY OF REFERENCES AND SUPPORTING INFORMATION*****References***

AFRCI 36-114, *Procedures on Air Reserve Technicians (ART) Who lose Active Membership in the Reserve*, 14 July 2011

DoD Priority Placement Program (PPP) Handbook, 26 July 2011

10 U.S.C., Sec 10216, *Military Technicians (Dual Status)*

10 U.S.C., Sec 14702, *Retention on Reserve Active-Status List of Certain Officers in the Grade of Major, Lieutenant Colonel, Colonel, or Brigadier General*

Adopted Forms

Air Force (AF) Form 847, *Recommendation for Change of Publication*

Abbreviations and Acronyms

AFRC—Air Force Reserve Command

ART—Air Reserve Technician

CPS—Civilian Personnel Section

CSRS—Civil Service Retirement System

DoD—Department of Defense

DOS—Date of Separation

DSR—Discontinued Service Retirement

EAD—Extended Active Duty

FERS—Federal Employee Retirement System

FSS—Force Support Squadron

MRA—Minimum Retirement Age

MSD—Mandatory Separation Date

OPM—Office of Personnel Management

PRDA—Personnel Records Display Application

SCD—Service Computation Date

TFCS—Total Federal Commission Service

Attachment 2**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 potentially 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 existing civil service regulations, (a) if eligible for discontinued service retirement (DSR) your annuity would be reduced because you are under age 55 (CSRS), or (b) if eligible for DSR you may not be entitled to the annuity supplement (FERS) due to being less than your minimum retirement age (MRA) (e.g., 55-57 years old), or (c) 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) MRA/20 (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 no later than _____.
4. If you do not desire to apply for extension of your MSD, complete paragraph 3 of the attached request by entering your initials in the block, signing the memorandum, and returning it to the FSS no 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/FSS CHIEF

Attachment:

Memorandum of Request for Extension of MSD

Attachment 3

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 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 AFRC 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) -- Minimum Retirement Age (MRA) with 20 years of service (MRA/20).

3. JUSTIFICATION FOR REQUESTING EXTENSION BEYOND NORMAL AFRC POLICY DATE: _____

4. As a condition of this extension beyond the normal AFRC policy date, I understand and accept that my registration in the Department of Defense (DoD) Priority Placement Program (PPP) MAY BE DISCONTINUED UNTIL WITHIN ONE-YEAR OF NEW MSD (AS LONG AS I MEET DoD PPP REGISTRATION REQUIREMENTS) and that I will be subject to separation from my ART position upon attaining my new, extended MSD.

(SIGNATURE) (DATE)

Attachments:

- 1. AFRC Form 121
- 2. Reserve Brief "SURF"
- 3. Fitness Report