

BY ORDER OF THE
SECRETARY OF THE AIR FORCE

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Personnel

CIVILIAN PHASED RETIREMENT PROGRAM

COMPLIANCE WITH THIS PUBLICATION IS MANDATORY

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This publication implements Air Force Policy Directive (AFPD) 36-1, *Appropriated Funds Civilian Management and Administration*; and supplements Department of Defense Instruction (DoDI) 1400.25, Volume 833, *DoD Civilian Personnel Management System: Phased Retirement*. The DoD Instruction is printed word-for-word in regular font without editorial review. The Department of the Air Force (DAF) supplementary material is printed in bold font and indicated by “(Added)(DAF).” This instruction establishes guidance, assigns responsibilities, and prescribes procedures for the use of Phased Retirement within the Department of the Air Force, to include United States Space Force (USSF). In collaboration with the Chief of the Air Force Reserve (AF/RE), the Director of the Air National Guard (NGB/CF), and the Deputy Chief of Space Operations for Human Capital (SF/S1), the Deputy Chief of Staff for Manpower, Personnel, and Services (AF/A1) develops personnel policy for civilian phased retirement. This instruction applies to civilian employees within the Department of the Air Force, to include the United States Space Force and Title 5 civilian employees of the Air Force Reserve and the Air National Guard, who are covered under the Civil Service Retirement System (CSRS) or the Federal Employees’ Retirement System (FERS) except where noted otherwise. The Chief of the National Guard Bureau will determine the extent to which this instruction will apply to the Title 5 National Guard employees or whether they will be governed by separate regulations issued by Chief of the National Guard Bureau. It does not apply to Title 32 Air Force Reserve or Air National Guard Technicians or to non-appropriated fund employees. This instruction requires the collection and or maintenance of information protected by the Privacy Act of 1974 authorized by DoDI 5400.11, *DoD Privacy and Civil Liberties Programs*, 29 January 2019 The application system of records notice (SORN), OPM/GOVT-1, *General Personnel Records*, applies and is available at <http://dpclo.defense.gov/Privacy/SORNs.aspx> . Ensure all records generated as a result of processes prescribed in this publication adhere to Air Force Instruction (AFI) 33-322, *Records Management and Information Governance Program*, and are disposed in accordance with the Air Force Records Disposition Schedule, which is located in the Air Force Records Information

Management System. This publication may be supplemented at any level; all major command (MAJCOM) or field command (FLDCOM) level supplements must be approved by the Human Resources Management Strategic Board prior to certification and approval. All supplements that directly implement this publication must be routed to the office of primary responsibility (OPR) for coordination. Send all recommended changes and questions about this publication to the OPR listing above using DAF Form 847, *Recommendation for Change of Publication*; route DAF Forms 847 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 DAF manual (DAFMAN) 90-161, *Publishing Processes and Procedures*, 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 requestor’s commander for non-tiered compliance items.

SUMMARY OF CHANGES

This document has been revised and should be completely reviewed. This rewrite includes identifying the antecedent publication being implemented and revises references to the previous Directive-type Memorandum (DTM) 16-004, *Phased Retirement*. It removes the exclusion of mission critical occupations from phased retirement eligibility to allow for that decision to be made at the organizational or appropriate level. It adds appropriate considerations and terminology due to the stand-up of the USSF along with administrative changes to formatting so DAF guidance aligns with the organizational layout of DoDI 1400.25V833.



DoD INSTRUCTION 1400.25, VOLUME 833 DoD CIVILIAN PERSONNEL MANAGEMENT SYSTEM: PHASED RETIREMENT

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| Originating Component: | Office of the Under Secretary of Defense for Personnel and Readiness |
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| Incorporates and Cancels: | Directive-type Memorandum DTM-16-004, "Phased Retirement," June 21, 2016 |
| Approved by: | Alexis Lasselle Ross, Performing the Duties of the Under Secretary of Defense for Personnel and Readiness |
| (Added)(DAF) Approved by: | John A. Fedrigo, Principal Deputy Assistant Secretary of the Air Force for Manpower and Reserve Affairs |

Purpose: This issuance is composed of several volumes, each containing its own purpose. In accordance with the authority in DoD Directives 5124.02 and 1400.25:

- This instruction establishes and implements policy, establishes procedures, provides guidelines and model programs, delegates authority, and assigns responsibilities regarding civilian personnel management within the DoD.
- This volume establishes and implements DoD policy, delegates authority, assigns responsibilities, and provides procedures regarding the Phased Retirement Program in accordance with DoD Directive 1400.25.

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SECTION 1: GENERAL ISSUANCE INFORMATION

1.1. APPLICABILITY.

This issuance:

a. Applies to OSD, the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities within the DoD (referred to collectively in this issuance as the “DoD Components”).

b. Does not apply to non-appropriated fund employees or Service members, in accordance with Section 8331(1)(L)(ii) of Title 5, United States Code.

1.2. POLICY.

In accordance with Sections 8336a and 8412a of Title 5, United States Code:

a. DoD Components:

(1) May use phased retirement in compliance with Part 848 of Title 5, Code of Federal Regulations (CFR).

(2) Must use a written agreement for each phased retiree.

b. Phased retirement is:

(1) A human resource tool to assist with the transfer of knowledge and provide continuity of operations on a short-term basis.

(2) Voluntary and requires the mutual consent of both the employee and the authorized DoD Component official.

(3) A one-time occurrence per phased retiree.

c. Phased retirees:

(1) Will work 50 percent of a full-time schedule while receiving a portion of their retirement annuity.

(a) (Added)(DAF) The Office of Personnel Management (OPM) has the authority to direct an agency to return a phased retiree, who has been allowed to work more than the fifty (50) percent work schedule, to full employment, terminating phased retirement (PR).

(2) Must spend at least 20 percent of hours worked mentoring.

(3) May elect to enter full retirement status at any time.

(4) May request to return to full-time employment; approval requires the authorized DoD Component official's concurrence.

(5) (Added)(DAF) Must remain on the same position authorization as prior to PR. (T-0)

(6) (Added)(DAF) Should not be moved to over-hire billets or other authorizations. The hiring of a part-time employee to execute the remaining fifty (50) percent manning hours or the hiring of a full-time over hire must only be accomplished if funding is available to support both the phased retiree's part-time salary and the part-time or full-time replacement. (T-0)

1.3. INFORMATION COLLECTIONS.

The Standard Form 3116, "Phased Employment/Phased Retirement Status Elections," and the Department of Defense (DD) Form 3018, "Phased Retirement Request and Agreement, referred to in Paragraphs 3.3.a.(1) and 3.3.a.(2) respectively, do not constitute public collections in accordance with Part 1320 of Title 5, CFR.

SECTION 2: RESPONSIBILITIES

2.1. ASSISTANT SECRETARY OF DEFENSE FOR MANPOWER AND RESERVE AFFAIRS.

Under the authority, direction, and control of the Under Secretary of Defense for Personnel and Readiness, the Assistant Secretary of Defense for Manpower and Reserve Affairs has overall responsibility for the development of DoD civilian personnel policy covered by this volume.

2.2. DEPUTY ASSISTANT SECRETARY OF DEFENSE FOR CIVILIAN PERSONNEL POLICY. Under the authority, direction, and control of the Assistant Secretary of Defense for Manpower and Reserve Affairs, the Deputy Assistant Secretary of Defense for Civilian Personnel Policy supports the development of civilian personnel policy covered by this volume and monitors its execution by DoD Components, ensuring consistent implementation and continuous application throughout DoD.

2.3. DIRECTOR, DEPARTMENT OF DEFENSE HUMAN RESOURCES ACTIVITY. Under the authority, direction, and control of the Under Secretary of Defense for Personnel and Readiness, the Director, Department of Defense Human Resources Activity, provides support to the Deputy Assistant Secretary of Defense for Civilian Personnel Policy, as appropriate, in the execution of the procedures in this volume.

2.4. DIRECTOR, DEFENSE FINANCE AND ACCOUNTING SERVICE. Under the authority, direction, and control of the Under Secretary of Defense (Comptroller)/Chief Financial Officer of the Department of Defense, the Director, Defense Finance and Accounting Service:

- a. Directs and oversees finance and accounting requirements, procedures, and functions for all appropriated fund activities.
- b. Establishes and enforces requirements, principles, standards, procedures, processes, and practices necessary to comply with finance and accounting statutory and regulatory requirements applicable to the DoD.

2.5. DIRECTOR, WASHINGTON HEADQUARTERS SERVICES (WHS), AND DOD COMPONENT HEADS WITH INDEPENDENT APPOINTING AUTHORITY. The Director, WHS, under the authority, direction, and control of the Chief Management Officer of the Department of Defense; and the DoD Component heads with independent appointing authority may determine eligibility for the Phased Retirement Program and approve employee requests.

2.6. (Added)(DAF) ASSISTANT SECRETARY OF THE AIR FORCE FOR MANPOWER AND RESERVE AFFAIRS (SAF/MR). Serves as an agent of the Secretary and provides guidance, direction, and oversight for all matters pertaining to civilian phased retirement.

2.7. (Added)(DAF) DEPUTY CHIEF OF STAFF OF THE AIR FORCE FOR MANPOWER, PERSONNEL AND SERVICES (AF/A1). Develops, coordinates, and executes personnel policy and essential procedural guidance for the management of the DAF civilian PR program.

2.8. (Added)(DAF) DIRECTOR, CIVILIAN FORCE MANAGEMENT DIRECTORATE (AF/A1C). Under the authority and direction of the AF/A1, and in coordination with the Deputy Chief of Space Operations for Human Capital (SF/S1),

- a. (Added)(DAF) Directs development and implementation of the DAF civilian PR program.
- b. (Added)(DAF) Monitors program compliance with the law, Department of Defense policy and this instruction.
- c. (Added)(DAF) Assesses DAF use of the PR program.
- d. (Added)(DAF) Provides guidance on the provisions of this instruction.

2.9. (Added)(DAF) AIR FORCE PERSONNEL CENTER (AFPC).

- a. (Added)(DAF) Performs operational oversight of the civilian PR program for major commands, field commands, combatant commands, civilian personnel sections and employees.
- b. (Added)(DAF) Provides operational instructions and procedural guidance regarding provisions of this instruction, to include procedures for entry into PR, extensions to or reductions in the PR termination date, return to full employment from PR, entry into full retirement from PR and transfers to/from another agency when the employee is participating in PR.
- c. (Added)(DAF) Ensures requests for personnel action (RPA) are processed according to the OPM, Guide to Processing Personnel Actions and this instruction.

2.10. (Added)(DAF) HEADS OF MAJOR COMMANDS, FIELD COMMANDS AND RELEVANT SECRETARIAT, AIR STAFF AND OFFICE OF THE CHIEF OF SPACE OPERATIONS (OCSO/SPACE STAFF) OFFICIALS. Provide oversight of the use of the PR program within their organization, including the option to decide that part of, or the entire organization will not utilize the PR program, and ensure that PR requests are decided fairly, consistently and in accordance with (IAW) paragraph 3.3.c. of this instruction. (T-1)

2.11. (Added)(DAF) INSTALLATION COMMANDERS AND DIRECTORS, TENANT COMMANDERS AND DIRECTORS, HEADS OF ACTIVITIES, COMMANDERS OF AIR FORCE COMPONENTS OF COMBATANT COMMANDS AND HEADQUARTERS DAF 3-LETTER DIRECTORS

- a. (Added)(DAF) Administer the use of PR within their organization. (T-2)
- b. (Added)(DAF) Ensure personnel are informed of their rights, responsibilities, and PR program requirements. (T-1)
- c. (Added)(DAF) Ensure compliance with applicable directives for tracking mentoring requirements. (T-1)

d. (Added)(DAF) Are the authorized approving official for PR requests and other PR decisions (extensions, return to full-time employment, etc.) for non-senior executive service (SES) positions.

e. (Added)(DAF) Follow operational procedures outlined in paragraph 3.3 of this instruction. (T-1)

2.12. (Added)(DAF) CIVILIAN PERSONNEL SECTIONS (CPS).

a. (Added)(DAF) Assist Commanders/civilian equivalents, managers, and supervisors in administering civilian PR within their organizations. (T-1)

b. (Added)(DAF) Should refer employees with questions about PR to the AFPC Benefits and Entitlements Service Team (BEST).

c. (Added)(DAF) Ensure civilian PR application approvals and/or denials comply with law, regulation, and policy. (T-1)

d. (Added)(DAF) Follow operational procedures outlined in paragraph 3.3 of this instruction. (T-1)

2.13. (Added)(DAF) IMMEDIATE SUPERVISORS. Will refrain from coercing any employee into entering PR, as it is a voluntary program. (T-1) Follow operational procedures outlined in paragraph 3.3 of this instruction. (T-1)

2.14. (Added)(DAF) EMPLOYEES.

a. (Added)(DAF) Are responsible for obtaining information regarding the PR program including personal financial implications of PR participation prior to applying for PR approval.

b. (Added)(DAF) Complete all of the required training, forms and procedures required for participation in PR.

c. (Added)(DAF) Follow operational procedures outlined in paragraph 3.3 of this instruction. (T-1)

SECTION 3: PROCEDURES

3.1. ELIGIBILITY.

a. Retirement-eligible employees must have been employed on a full-time basis for at least a 3-year period ending on the effective date of entry into phased retirement status.

(1) Civil Service Retirement System employees are eligible for phased retirement if they have at least 30 years of service and are at least 55 years of age, or they have 20 years of service and are at least 60 years of age.

(2) Federal Employees Retirement System employees are eligible for phased retirement if they have at least 30 years of service and have reached their minimum retirement age (between ages 55 and 57 depending on their birth year), or have 20 years of service and are at least 60 years of age.

b. Within DoD, employees who qualify for retirement under the provisions for law enforcement officers, firefighters, nuclear materials couriers, and air traffic controllers are not eligible for phased retirement.

c. (Added)(DAF) Employees excluded from participation in PR are:

(1) (Added)(DAF) Employees not covered under either the CSRS or FERS.

(2) (Added)(DAF) Employees covered by a special work schedule authority that does not allow for a regularly recurring part-time work schedule. Examples may include, but are not limited to:

(a) (Added)(DAF) Nurses covered by Title 38 United States Code Section 7456 or 7456A;

(b) (Added)(DAF) Firefighters (occupational series 0081) even if not covered by special retirement coverage provisions;

(3) (Added)(DAF) U.S. civilians assigned to foreign locations outside of the continental United States. U.S. civilians assigned to non-foreign locations outside of the continental United States are not excluded from participation. However, careful consideration should be given to whether PR participation is conducive to the position including any impact to statutory return rights;

(4) (Added)(DAF) Positions funded by the central salary account;

(5) (Added)(DAF) FERS employees only eligible for a Minimum Retirement Age +10 retirement;

(6) (Added)(DAF) Employees only eligible for retirement based on being age 62 with at least 5 years of civilian service;

(7) **(Added)(DAF) Employees receiving worker’s compensation; and**

(8) **(Added)(DAF) Employees on a performance improvement plan or with a current formal disciplinary action.**

3.2. REQUIREMENTS.

a. Working Percentages and Established Hours.

(1) **Working Percentages.** A phased retiree will be appointed to a position with a 50 percent work schedule. The phased retiree may not be assigned additional hours of work except in rare circumstances when management documents in writing that all of the following conditions are met:

(a) The work is necessary to respond to an emergency posing a significant, immediate, and direct threat to life or property.

(b) An authorized DoD Component official determines that no other qualified employee is available to perform the required work.

(c) The phased retiree is relieved from performing excess work as soon as reasonably possible (e.g., by management assignment of work to other employees).

(d) When an emergency situation could have been anticipated in advance, management made advance plans to minimize any necessary excess work by the phased retiree.

(e) **(Added)(DAF) The DAF official authorized to make the determination in paragraph 3.2.a.(1)(b) is specified in paragraph 2.11.**

(f) **(Added)(DAF) The reference to “appointed to a position with a 50 percent work schedule” in paragraph 3.2.a.(1) is meant to convey that the phased retiree will be changed to a 50 percent work schedule, not that the phased retiree is moved to a new appointment and/or new position.**

(2) **Established Hours.** The phased retiree’s work schedule is subject to any applicable agency policy and applicable collective bargaining agreement. Any basic pay received for hours outside of the phased retiree’s work schedule is subject to retirement deductions and agency contributions. However, it is not used in computing retirement benefits.

(3) (Added)(DAF) Work Schedule.

(a) **(Added)(DAF) A phased retiree is permitted to work a maximum of forty (40) hours during a given bi-weekly pay period and, except as otherwise expressly provided in law or regulation, is treated like any other employee on a part-time tour of duty.**

(b) **(Added)(DAF) With supervisory approval, a phased retiree may participate in a flexible or compressed work schedule program as prescribed in**

DoDI1400.25v630_AFI36-815, *Leave*.

(c) (Added)(DAF) A phased retiree:

1. (Added)(DAF) Is not permitted to work intermittent pay periods.

2. (Added)(DAF) Must have an officially established part-time work schedule.

(T-0)

3. (Added)(DAF) Must have a work schedule that ensures work time does not exceed a maximum of forty (40) hours at the end of each bi-weekly pay period which includes a minimum of eight (8) hours of mentoring activities (mandatory requirement) unless leave has been approved. (T-1)

4. (Added)(DAF) Is subject to the Fair Labor Standards Act. See DoDI1400.25v610_AFI36-807, *Hours of Work and Holiday Observances*. Unless a phased retiree is working an approved alternate work schedule, the employee is limited to working 8 hours per scheduled workday. (T-1) Hours worked in excess of the officially established part-time work schedule are subject to overtime rules and restrictions as identified in paragraph 3.2.a.(4).

(4) (Added)(DAF) Overtime and Compensatory Time. A phased retiree is generally restricted from working more than 40 hours in a bi-weekly pay period. However, work in excess of the officially established schedule may be performed in rare and exceptional circumstances under the conditions specified in paragraph 3.2.a.(1).

(5) (Added)(DAF) Holidays. A phased retiree is subject to the same rules as a part-time employee with regard to holidays. In general, the phased retiree is entitled to a paid holiday if it falls on a scheduled workday. If a holiday falls on a scheduled non-workday, the phased retiree is not entitled to a paid holiday or an in-lieu-of holiday. Work schedules should not be adjusted for the sole purposes of changing a scheduled non-workday, falling on a holiday, to a scheduled workday in order for the phased retiree to receive a paid holiday.

b. Mentoring. Phased retirees will spend at least 20 percent of their working hours engaged in mentoring. DoD Components will establish mentoring guidelines to best fit their needs.

(1) Mentoring is not limited to an employee who may assume the phased retiree's duties upon the phased retiree's final retirement.

(2) An authorizing DoD Component official may waive the mentoring requirement in the event of an emergency or other unusual circumstances (e.g., extended absence of the mentee) that would make it impractical for the phased retiree to fulfill the mentoring requirement.

(a) (Added)(DAF) The DAF official authorized to make the determination in paragraph 3.2.b.(2) is specified in paragraph 2.11 of this instruction. The mentoring requirement may be waived only for so long as it is required for the emergency or situation to

be resolved.

(3) (Added)(DAF) Mentoring is an essential element of PR intended to allow the transfer of knowledge and skills from a well-experienced employee to other employees who are less experienced. A mentor may fill a variety of roles to include assessing the mentee's skills, abilities and goals, offering career path guidance, and to allow the transfer of technical competencies or organizational/institutional knowledge as determined appropriate by the supervisor and based upon the capabilities of the phased retiree.

(a) (Added)(DAF) The employee and the supervisor should be familiar with the DAF mentoring expectations and guidance provided in Air Force Handbook 36-2643, *Air Force Mentoring Program*.

(b) (Added)(DAF) In preparation for filling the mentoring role, the employee will complete mentoring training prior to entering PR. (T-3) Two mentoring courses are available online in Air Force e-Learning. *Fostering Mentoring Relationships* and *Finding and Nurturing a Mentor Relationship*. The total time for completion of both courses is less than one hour.

(c) (Added)(DAF) The phased retiree will develop a mentoring plan that identifies the mentee(s) to be mentored, mentee objectives, activities for achieving objectives, and other supporting details. (T-1) The mentoring plan is subject to the supervisor's endorsement and the approving official's approval. The plan must be developed prior to the supervisor recommending approval or disapproval of the PR request. (T-3)

(d) (Added)(DAF) The phased retiree will carry out the mentoring requirement beginning with the effective date on which the PR commences. (T-3)

(e) (Added)(DAF) Mentoring hours may be distributed over the bi-weekly pay period and must be recorded to demonstrate compliance with PR requirements. (T-3)

(f) (Added)(DAF) The phased retiree (mentor) and mentee may choose to utilize MyVECTOR, a web-based mentoring network that allows mentees to manage their career development with the input and guidance from a mentor.

(4) (Added)(DAF) Performance Standards. Mentoring activities should be clearly defined in the phased retiree's performance standards and describe how the requirements and expectations are to be evaluated. New or modified performance standards are to be recorded in the phased retiree's official performance plan. Performance standards are to be written at the "Fully Successful" level. The standards should include specific, measurable, achievable, relevant, and timely criteria, which provide the framework for developing effective results and expectations.

c. (Added)(DAF) Pay.

(1) (Added)(DAF) The phased retiree receives half of the gross pay, which is subject to employee withholdings for Federal Employees' Health Benefits (FEHB), Federal Employees'

Group Life Insurance (FEGLI), Federal Employees' Dental and Vision Program, Federal Long Term Care Insurance Program, Thrift Savings Plan, Federal and State tax, Social Security and Medicare tax, and CSRS or FERS deductions as appropriate. The phased retiree also receives half of the earned retirement annuity from OPM.

(2) (Added)(DAF) A phased retiree is considered a full-time employee for the purpose of FEHB and FEGLI insurance benefits, premiums, and agency contributions.

d. (Added)(DAF) Leave. The phased retiree retains annual and sick leave balances and does not receive a lump sum payment for annual leave upon transition to phased retirement.

(1) (Added)(DAF) Leave accrual is prorated at fifty (50) percent of the full-time earnings.

(2) (Added)(DAF) The annual leave ceiling remains unchanged.

(3) (Added)(DAF) The phased retiree may accrue additional annual and sick leave on a prorated basis in emergency situations requiring work in excess of the scheduled hours as specified in paragraph 3.2.a.(1).

(4) (Added)(DAF) The phased retiree's sick leave balance is not used in the calculation of the PR annuity. The sick leave balance is utilized for service credit upon full retirement.

3.3. OPERATIONAL PROCEDURES.

a. Applying for Phased Retirement.

(1) Employees meeting the eligibility requirements for phased retirement will complete and submit the Standard Form 3116, "Phased Employment/Phased Retirement Status Elections," located on the General Services Administration Forms Library website at <https://www.gsa.gov/reference/forms>, along with any appropriate documentation, to an authorized DoD Component official.

(a) (Added)(DAF) The employee will, prior to applying for PR or contacting AFPC/BEST, use AFPC's Phased Retirement Ball Park Calculator to generate a PR annuity estimate. (T-3) The Ball Park Calculator PR annuity estimate is an approximate estimate of the amount of retirement pay that the employee will receive while in PR.

(b) (Added)(DAF) The employee will, prior to applying for PR, contact BEST to obtain retirement counseling, a formal annuity estimate, and information regarding payment of any deposit or redeposit for prior federal civilian or military service (if applicable). (T-3)

(c) (Added)(DAF) The employee will, prior to entering PR, complete payment of any civilian deposit or redeposit or military service deposit, for which the employee wishes to receive credit. (T-0)

(d) (Added)(DAF) IAW paragraph 3.2.b(3)(c), the employee will submit the proposed

mentoring plan to the immediate supervisor. (T-1).

(e) (Added)(DAF) The employee will request approval to enter PR by submitting the DD Form 3018, *Phased Retirement Request and Agreement* with Part I, Section A completed, and the Standard Form (SF) 3116, *Phased Employment/Phased Retirement Status Elections* with Part 1a, Section A and B completed to the immediate supervisor. (T-3)

(f) (Added)(DAF) The supervisor will determine whether the employee meets the participation eligibility requirements specified in Section 3.1 and is appropriate for PR IAW paragraph 3.2.b. (T-1)

(g) (Added)(DAF) The supervisor will ensure that the employee is aware of the PR mentoring obligation and has developed an appropriate mentoring plan. (T-1) Mentoring plans that are not acceptable may be returned to the employee to be reworked or may be modified by the supervisor.

(h) (Added)(DAF) The supervisor will establish, with the requesting employee, the proposed beginning and ending date of PR and ensure that information is entered on the SF 3116, Section B. (T-1) Time limits for PR are specified in section 3.3.b. of this instruction. (Note: When choosing an effective date, employee and supervisor should allow time for processing of the PR application.)

(i) (Added)(DAF) The supervisor will ensure that the employee completes Part II, Section D and signs Section E of the DD Form 3018. (T-1)

(j) (Added)(DAF) The supervisor will complete Part I, Section B of the DD Form 3018 indicating a recommendation of approval or disapproval of PR participation. (T-1) Remarks explaining recommendation may be added in Part II, Section E.

(k) (Added)(DAF) The supervisor will submit the DD Form 3018 with Part I completed and SF 3116 with Sections A and B completed to the approving official for consideration. (T-1)

(2) An authorized DoD Component official may approve the application, provided a time limit for the period of phased retirement is established, in accordance with Paragraph 3.3.b.(1).

(a) (Added)(DAF) IAW paragraph 2.11 of this instruction, Commanders, Directors, and Headquarters Department of the Air Force 3-letter directors are the approving officials for non-SES positions.

(b) (Added)(DAF) The Secretary of the Air Force is the approving official for a civilian senior executive. See AFI 36-901, *Civilian Senior Executive Management*.

(c) (Added)(DAF) The approving official will complete and sign Part II, Section C of the DD Form 3018, indicating approval or denial of request. Approvals (including approvals of requests to extend or reduce the PR termination date) will include the approved beginning and ending dates IAW paragraph 3.3.b. (T-0) For initial approval to enter PR, the approving

official will also sign the SF 3116, Part 1a, Section C. (T-0). For a denial to enter PR, the SF 3116 is returned with Section C unsigned. (T-0) Requests to extend or reduce the PR termination date will only include the DD Form 3018, not the SF 3116. (T-0)

(d) (Added)(DAF) The completed DD Form 3018 and SF 3116 are returned to the requesting supervisor.

(e) (Added)(DAF) The supervisor will file a copy of the package with approving official's signature in the Supervisor's Employee Work Folder, return the originals to the requesting employee and ensure the requesting employee is notified of the final decision. (T-1)

(3) If approved for phased retirement, the employee must submit the appropriate documentation to his or her servicing human resources office to transition into a phased retirement status.

(a) (Added)(DAF) The supervisor will establish the PR work schedule with employee, ensuring the schedule meets the work hour limits for PR participation and the requesting employee is aware of and agrees with the work hour limit. (T-1)

(b) (Added)(DAF) The supervisor will coordinate submission of the phased retirement RPA and required documents to the CPS. (T-3)

(c) (Added)(DAF) The CPS will coordinate and route the RPA and required documentation to AFPC and ensure that the phased retiree's work schedule and not-to-exceed (NTE) date are coded effective on the PR commencement date. (T-1)

(d) (Added)(DAF) The employee will submit the Application for Immediate Retirement Civil Service Retirement System (CSRS) (SF 2801) or Application for Immediate Retirement Federal Employees Retirement System (FERS) (SF 3107) and other required retirement documents to BEST as early as possible prior to the proposed date of entry into PR. (T-3)

(4) An employee may withdraw his or her application at any time before the phased retirement becomes effective, but not after.

(5) (Added)(DAF) Upon entering phased retirement,

(a) (Added)(DAF) The supervisor will ensure the phased retiree has completed mentoring training IAW paragraph 3.2.b(3)(b) of this instruction. (T-3)

(b) (Added)(DAF) The supervisor will ensure that "mentoring" is added as a critical element to the approved phased retiree's performance standards. (T-1)

(c) (Added)(DAF) The supervisor will establish with the phased retiree how the mentoring hours will be tracked and monitor the phased retiree's work time and mentoring hours to ensure compliance with all PR regulations and policies. (T-1)

(d) (Added)(DAF) The supervisor will monitor effective and NTE dates to ensure

compliance with approved PR timeframe. (T-1)

(e) (Added)(DAF) The employee will implement the mentoring plan and record the hours worked and mentoring hours in accordance with paragraph 3.2.b. of this instruction. (T-1)

(6) (Added)(DAF) A phased retiree may request to extend or reduce the length of the phased retirement timeframe.

(a) (Added)(DAF) The phased retiree will request the extension/reduction by completing and submitting a new DD Form 3018 to the immediate supervisor as early as possible but no later than 30 calendar days prior to end date of the current approved PR agreement. (T-1) A new SF 3116 is not required for extension/reduction in timeframes.

(b) (Added)(DAF) The supervisor will ensure the proposed change in timeframe is allowable IAW paragraph 3.3.b. of this instruction, complete section B and forward the DD Form 3018 to the approving official for a determination. (T-1)

(c) (Added)(DAF) The approving official will verify the timeframes are IAW 3.3.b., complete and sign Part II, Section C of the DD Form 3018, indicating approval or denial of request and return the completed form to the supervisor. (T-1)

(d) (Added)(DAF) The supervisor will file a copy of the package with the approving official's signature in the Supervisor's Employee Work Folder, return the originals to the requesting employee and ensure the requesting employee and CPS is notified of the final decision. (T-1)

(e) (Added)(DAF) The CPS will ensure that the NTE date is updated upon any approved extension to the PR termination date and that BEST is informed of the extension. (T-1)

(7) (Added)(DAF) A phased retiree may request to end PR and return to full employment.

(a) (Added)(DAF) The phased retiree will complete Sections A and B of the SF 3116 Part 2a and submit to the supervisor no later than 30 calendar days prior to end date of the current approved PR agreement. (T-1) The DD Form 3018 is not required for requests to return to full employment. (Note: OPM requires receipt of the approved request at least 15 calendar days prior to expiration of the time limit agreement in order for timely processing.)

(b) (Added)(DAF) The supervisor will indicate date received in the agency portion of Section B and forward the SF 3116 to the approving official for a determination. (T-1) (Note: The SF 3116 only contains a signature section for the approving official. There is no section for supervisor recommendation or signature.)

(c) (Added)(DAF) The decision to approve or deny a phased retiree's request to return to full employment should be based on sound business considerations and mission requirements.

(d) (Added)(DAF) If the request to return to full employment is approved, the approving

official will complete and sign the SF 3116, Part 2a, Section C and return completed forms to the requesting supervisor. (T-0)

(e) (Added)(DAF) If the request is denied, the approving official will leave the SF 3116, Part 2a, Section C blank and return the form, along with a written explanation for the denial, to the requesting supervisor. (T-1)

(f) (Added)(DAF) The supervisor will file a copy of the package in the Supervisor's Employee Work Folder, return the originals to the requesting employee and ensure the requesting employee is notified of the final decision. (T-1)

(g) (Added)(DAF) If the request to return to full employment is approved, the supervisor will coordinate submission of the RPA and required documentation to the CPS. (T-3)

(h) (Added)(DAF) In coordination with AFPC and BEST, the CPS will ensure that approved requests to return to full employment from PR are processed appropriately to include providing notification to OPM and proper annuitant indicator coding. (T-1) Employees who have returned to full employment from PR are not considered reemployed annuitants.

(i) (Added)(DAF) If the request to return to full employment is denied, the phased retiree may elect to: continue PR for the remainder of the time limit agreement; request, IAW paragraph 3.3.a(6), approval to extend the existing time limit agreement; apply to transfer to a full time position at another agency or elect to enter full retirement.

(8) (Added)(DAF) A DAF phased retiree may apply for and be selected for a position in another Federal agency/DoD Component. Likewise, an individual participating in PR at another Federal agency/DoD Component may apply for and be selected for a DAF position.

(a) (Added)(DAF) To continue PR at the gaining agency, the phased retiree must submit the DD Form 3018 and Part 3a of the SF 3116 to the gaining agency and receive approval from that agency's authorized approving official. (T-0)

(b) (Added)(DAF) To end PR and return to full employment at the gaining agency, no gaining agency approval is required and no DD Form 3018 is submitted. The employee should make the gaining agency aware of the phased retirement status. The phased retiree will complete Part 3b of the SF 3116 and provide to the losing agency human resources office. (T-0) No approval or signature on the SF 3116 is required. However, the form must be provided to OPM to prevent the employee incurring a debt for overpayment of the retirement annuity once PR terminates. (T-0)

(c) (Added)(DAF) An employee may only enter PR one time, so an employee who has returned to full employment, would not be eligible to request to re-enter PR.

(d) (Added)(DAF) A DAF phased retiree who chooses to move to another Federal agency/DoD Component and either continue PR or return to full employment should promptly notify the CPS and supervisor as well as BEST so that appropriate coordination is

accomplished.

(e) (Added)(DAF) In coordination with AFPC and BEST, the CPS will ensure that a phased retiree who is moving to another Federal agency/DoD Component and phased retirees from other Federal agencies who are moving to DAF are processed appropriately. (T-1)

(9) (Added)(DAF) A phased retiree may, at any time prior to the expiration of the time limit agreement, enter full retirement by submitting an application for immediate retirement (SF 2801 CSRS or SF 3107 FERS) and other required retirement forms to BEST.

(a) (Added)(DAF) A phased retiree who is not approved to return to full-time status, is unable to obtain an extension to the time limit agreement, or is unable to transfer to a different agency by the expiration date of the time limit agreement will be considered to have elected full, immediate retirement. Such separation will be considered voluntary in accordance with the PR agreement. (T-0)

(b) (Added)(DAF) The CPS will ensure that the phased retiree is separated from the roles upon expiration/termination of the PR period. (T-1)

b. Time Limitation for Phased Retirement.

(1) The authorized DoD Component official and the employee will establish a time limit for the period of phased retirement as a condition of approval. Once the period of phased retirement is agreed upon, the DD Form 3018, located on the DoD Forms Management Program website at <https://www.esd.whs.mil/Directives/forms/>, will be used to document the date the employee's period of phased retirement will end.

(a) (Added)(DAF) Time limits may vary on a case-by-case basis and are to be set for any period up to a maximum of one (1) year from the start date of the agreement. Additional time may be requested by either the employee or the approving official. All extensions are to be finalized at least thirty (30) calendar days prior to the expiration of the time limit agreement currently in effect, in increments not to exceed one additional year. (T-2)

(b) (Added)(DAF) The maximum total time an employee may participate in PR is two (2) years. (T-1)

(c) (Added)(DAF) While in PR, the phased retiree continues to remain on the same position authorization while executing the manning hours at fifty (50) percent.

(2) The following information about the termination of the employee's phased retirement will be included in the DD Form 3018.

(a) A statement that the employee may request permission from an authorized DoD Component official to return to regular employment status at any time and an explanation of how returning to regular employment status would affect the employee.

(b) A statement that the employee may elect to fully retire at any time without DoD

Component approval.

(c) A statement that the employee may accept a new appointment at another agency, with or without the new agency's approval for phased retirement, at any time before the agreement expires or within 3 days after it expires, and a statement that the DoD Component's agreement will terminate upon the employee's acceptance of an appointment at a non-DoD agency.

(d) A statement that when the phased retirement time limit ends, the phased retiree will be separated from employment and that such separation will be considered voluntary.

(e) A statement that if the employee is separated from phased employment and is not employed by another federal agency within 3 days (i.e., the employee has a break in service of greater than 3 days), the employee will be deemed to have elected full retirement.

(3) The authorizing DoD Component official and the employee may mutually agree to rescind an existing agreement, or enter into a new agreement to extend or reduce the agreed upon term of phased retirement, by entering into a new written agreement before the existing agreement expires.

c. Criteria for Approval or Denial. Any decision to approve or deny a request for phased retirement will be based on sound business practices. Considerations include, but are not limited to:

- (1) Current performance rating of at least "Fully Successful" or equivalent.
- (2) Whether a part-time work schedule is appropriate for the employee's position.
- (3) Whether the employee is willing and able to meet the mentoring requirement.
- (4) Whether management has identified appropriate mentoring activities for the employee to perform.
- (5) How the employee's change in work schedule will affect the work unit's ability to meet goals and objectives.
- (6) Whether operational needs require the employee to work in excess of a 50 percent work schedule.
- (7) Whether the employee encumbers a mission critical or emergency essential position.
- (8) Whether the employee has knowledge that needs to be transferred.
- (9) As applicable, whether funding is available for both a phased retiree and a newly hired employee.
- (10) (Added)(DAF) The employee has not previously entered PR. An individual may only enter PR once. (T-0)**

(11) (Added)(DAF) Denial of a request to enter PR or a request to return to regular full-time employment may only be grieved if the position is a bargaining unit position and covered by the negotiated grievance procedure under the collective bargaining agreement. Decisions surrounding PR (to include but not limited to decisions to disapprove employee requests to return to regular full-time employment) are not considered “adverse actions” under Title 5, United States Code Chapter 7501-7515 and are not appealable to the Merit Systems Protection Board.

d. Phased Retirement Processing. Servicing human resources offices will establish procedures for implementing approved phased retirement requests. Copies of the phased retirement agreement and other necessary documents should be filed on the temporary (left) side of the official personnel folder. DoD Components and employees should maintain copies as well.

e. Outside Employment While on Phased Retirement. While on phased retirement, an individual remains a DoD employee in accordance with Part 2635 of Title 5, CFR. The employee is bound by ethics rules and any restrictions on outside employment.

(1) (Added)(DAF) DAF phased retirees are bound by ethics rules and any restrictions on outside employment in accordance with Department of Defense 5500.07-R, *Joint Ethics Regulation (JER)*.

f. Bargaining Obligations. Before implementing the Phased Retirement Program for bargaining unit employees, organizations must fulfill their collective bargaining obligations.

(1) (Added)(DAF) Phased retirees are subject to the rules under Title 5, United States Code Chapter 7101-7151. Since phased retirees convert from full-time to part-time status, bargaining unit coverage status depends on whether part-time employees are included or excluded from the local bargaining unit description.

g. Employee Rights. Any complaint procedures, including any applicable administrative or collective bargaining grievance procedures that are available in regular employment, remain available to phased retirees. No new rights are provided.

h. Limitation of Utilization of Phased Retirement. DoD Component heads may limit the number or percentage of phased retirees as appropriate

i. (Added)(DAF) Disability Retirement. A phased retiree is not eligible to apply for disability retirement after entering PR.

j. (Added)(DAF) Court Orders. A phased retiree is responsible for forwarding to OPM any court orders related to pay or annuity. (T-0)

k. (Added)(DAF) Performance and Conduct. A phased retiree is considered a part-time employee, has the same performance and conduct requirements as in regular employment, and retains the same due process rights. Removal prior to the end of the phased retiree’s time limit agreement could occur due to budget restrictions, performance, or conduct issues under existing workforce authorities.

GLOSSARY

G.1. ACRONYMS.

| ACRONYM | MEANING |
|---------------------|--|
| (Added)(DAF) AFI | Air Force Instruction |
| (Added)(DAF) AFPC | Air Force Personnel Center |
| (Added)(DAF) AFPD | Air Force Policy Directive |
| (Added)(DAF) BEST | Benefits and Entitlements Service Team |
| CFR | Code of Federal Regulations |
| (Added)(DAF) CPS | Civilian Personnel Section |
| (Added)(DAF) CSRS | Civil Service Retirement System |
| DD | Department of Defense (forms only) |
| (Added)(DAF) DAF | Department of Air Force |
| (Added)(DAF) DAFMAN | Department of Air Force Manual |
| (Added)(DAF) DTM | Directive Type Memorandum |
| (Added)(DAF) FEGLI | Federal Employees' Group Life Insurance |
| (Added)(DAF) FEHB | Federal Employees' Health Benefits |
| (Added)(DAF) FERS | Federal Employees' Retirement System |
| (Added)(DAF) FLDCOM | Field Command |
| (Added)(DAF) IAW | In Accordance With |
| (Added)(DAF) MAJCOM | Major Command |
| (Added)(DAF) NTE | Not to exceed |
| (Added)(DAF) OPM | Office of Personnel Management |
| (Added)(DAF) OPR | Office of Primary Responsibility |
| (Added)(DAF) PR | Phased Retirement |
| (Added)(DAF) RPA | Request for Personnel Action |
| (Added)(DAF) SES | Senior Executive Service |
| (Added)(DAF) SF | Standard Form |
| (Added)(DAF) SORN | System of Records Notice |
| WHS | Washington Headquarters Services |
| (Added)(DAF) USSF | United States Space Force |

G.2. DEFINITIONS.

Unless otherwise noted, these terms and their definitions are for the purpose of this issuance.

| TERM | DEFINITION |
|--|--|
| Authorized DoD Component official | A DoD Component head or one or more officials delegated authority by that DoD Component head to approve requests for phased retirement. |
| (Added)(DAF) Approving Official | The agency official authorized to approve phased retirement applications, as specified in 2.11. |
| (Added)(DAF) Central Salary Account | Manpower authorization for developmental purposes. |
| Full-Time | An officially established recurring work schedule of 80 hours per biweekly pay period. |
| (Added)(DAF) Mentoring | A process that focuses specifically on providing guidance, direction, and career advice, which includes a wide range of activities that allow for the transfer of knowledge and skills from one employee to others. |
| (Added)(DAF) Phased Employment | Less than full-time employment of a phased retiree. |
| Phased Retiree | Retirement-eligible employee who enters phased retirement status and who is not fully retired. |
| (Added)(DAF) Phased Retirement | Allows certain retirement-eligible employees to request to work on a part-time (50%) basis while receiving a portion (50%) of their annuity for a limited, agreed upon period of time. |
| (Added)(DAF) Phased Retirement Period | The period beginning on the date on which an individual becomes entitled to receive a phased retirement annuity and ending on the date on which the individual separates from phased retirement. |

**(Added)(DAF)
Phased Retirement
Status** **An employee concurrently employed in phased employment and eligible to receive a phased retirement annuity.**

**(Added)(DAF)
Retirement-Eligible
Employee** **For the purposes of phased retirement only, a retirement-eligible employee is an employee, who if separated from service, would meet the requirements under Title 5 United States Code Section 8336(a) and (b) for Civil Service Retirement System and Title 5 United States Code Section 8412(a) and (b) for Federal Employees Retirement System.**

**(Added)(DAF)
Time Limit** **The length of time an employee may participate in phased retirement.**

**(Added)(DAF)
Time Limit
Agreement** **A written condition of approval whereby the agency and the employee mutually agree on a specified time limit the employee may work as a phased retiree.**

**(Added)(DAF)
Working Percentage** **The percentage of full-time equivalent employment an employee may work as a phased retiree. By regulation, the Director of Office of Personnel Management establishes this percentage.**

REFERENCES

Code of Federal Regulations, Title 5
DoD Directive 1400.25, "DoD Civilian Personnel Management System," November 25, 1996
DoD Directive 5124.02, "Under Secretary of Defense for Personnel and Readiness (USD(P&R))," June 23, 2008
United States Code, Title 5
(Added)(DAF) DoDI 5400.11, *DoD Privacy and Civil Liberties Programs*, 29 January 2019
(Added)(DAF) AFPD 36-1, *Appropriated Funds Civilian Management and Administration*, 18 March 2019
(Added)(DAF) DAFMAN 90-161, *Publishing Processes and Procedures*, 15 April 2022
(Added)(DAF) AFI 36-901, *Civilian Senior Executive Management*, 23 January 2012
(Added)(DAF) AFI 33-322, *Records Management and Information Governance Program*, 28 July 2021

(Added)(DAF) Air Force Handbook 36-2643, *Air Force Mentoring Program*, 17 May 2019
(Added)(DAF) Department of Defense 5500.07-R, *Joint Ethics Regulation (JER)*, 30 August 1993
(Added)(DAF) DoDI 1400.25 Volume 630_AFI36-815, *Leave*, 14 November 2019
(Added)(DAF) DoDI 1400.25 Volume 610_AFI36-807, *Hours of Work and Holiday Observances*, 19 April 2019
(Added)(DAF) United States Code, Title 38

(Added)(DAF) *Prescribed Forms*
None

(Added)(DAF) *Adopted Forms*
(Added)(DAF) DAF Form 847, *Recommendation for Change of Publication*
(Added)(DAF) DD Form 3018, *Phased Retirement Request and Agreement*
(Added)(DAF) SF 2801, *Civil Service Retirement System Application for Immediate Retirement*
(Added)(DAF) SF 3107, *Federal Employees Retirement System Application for Immediate Retirement*
(Added)(DAF) SF 3116, *Phased Employment/Phased Retirement Status Elections*

(Added)(DAF) *Office Symbols*
(Added)(DAF) SAF/MR - Assistant Secretary of the Air Force, Manpower and Reserve Affairs
(Added)(DAF) AF/A1 - Air Force Deputy Chief of Staff, Manpower, Personnel and Services
(Added)(DAF) SF/S1 - Deputy Chief of Space Operations for Human Capital
(Added)(DAF) AF/RE - Chief of the Air Force Reserve
(Added)(DAF) NGB/CF - Director of the Air National Guard
(Added)(DAF) Office of the Chief of Space Operations

(Added)(DAF) *Terms*
(Added)(DAF) Field Command-A major subdivision of the USSF that is assigned a key part of the USSF mission. A field command is directly subordinate to the Space Staff Headquarters Air Force. All USSF field commands report to the Chief of Space Operations.
(Added)(DAF) Major Command-A major subdivision of the USAF that is assigned a key part of the USAF mission. A major command is directly subordinate to the Headquarters Air Force. All USAF major commands report to the Chief of Staff of the Air Force.
(Added)(DAF) Annuity-the monthly payment that a retiree receives.
(Added)(DAF) Minimum Retirement Age +10-eligibility to retire under a reduced annuity which is based on reaching the minimum retirement age (determined based on year of birth) and at least ten (10) years of creditable service, but less than the required thirty (30) years of service for a full, unreduced annuity