

SALARY OFFSET WAIVER

Name of Annuitant:	NOAC/Nature of Action:
Title, Pay Plan/Series/Grade:	LAC/Legal Authority:
Employing Agency/Organization/Geographic Duty Location:	Period Worked: (Beginning date and end date or currently working)
Date of Waiver Request:	Date of Response:
Approving Official, Organizational Level, and Location:	Type of Position: (Competitive or Excepted; and Temporary, Term, or Continuing Permanent)
Appointment Date:	Not to Exceed Date:

References: [5 U.S.C. 8344\(i\)](#), [5 U.S.C. 8468\(f\)](#); [5 CFR 553](#); [Guide to Processing Personnel Actions](#)

Instructions: The following review items are common to most of the delegations of the waiver authority. However, the delegations to the agencies varied. **Please review the agency's request for the waiver authority and the OPM letter of delegation to the agency to ensure that each case audit covers all of the specific conditions listed in the OPM letter of delegation.**

***Note:** The National Defense Authorization Act allows DoD special rights to employee reemployed annuitants. You may modify this worksheet as necessary to assist you in accomplishing this.

[Quick Link to "Case File Summary/Comments:"](#)

Y	N	Review Item	Comments
		Documentation includes the written waiver request and written waiver approval	
		Annuitant was not on agency's roll at time of approval of waiver, unless 5 CFR 553.201(e) need to retain particular individual, applies	
		The position fits within the occupations, grade, functions, situations, timing, number of approved waivers allocated, appointment type, etc. or other parameters approved by OPM. (Compare position to agency request letter and OPM letter of delegation.)	
The approval includes:			
		• Annuitant's Name	
		• Civil Service Retirement Number	
		• Date of Retirement	
		• Annuitant's Statement Declining Employment Without Waiver	

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Y	N	Review Item	Comments
		<ul style="list-style-type: none"> Position Title/Pay Plan/Series/Grade 	
		<ul style="list-style-type: none"> NTE Date 	
		<ul style="list-style-type: none"> Duty Location of Annuitant 	
		<ul style="list-style-type: none"> Work schedule (FT, PT, Intermittent; hours if not equal to 40) 	
		<ul style="list-style-type: none"> Waiver termination date 	
		<ul style="list-style-type: none"> Brief statement describing how the position's duties directly and solely support agency response to direct threat to life or property or situations resulting from unusual circumstances (for appointments and extensions). The statement should address <ul style="list-style-type: none"> a reasonable and sufficient justification that the position is temporary in nature and its duties directly and solely support agency response to the emergency hiring need or unusual circumstances. statement describes the reasons other staffing options did/will not work. 	
Y	N	Review Item	Comments
		Extension requests for continuing positions describe agency's all sources recruiting efforts, the lack of available qualified candidates, and reasons other flexibilities and incentives to hire or train an employee not requiring a waiver did/will not work, as well as demonstrate that the conditions which justified the initial exception still exist. The agency describes reasons that hiring incentives under 5 CFR 575 did/will not work.	
		Appointment and extensions were NTE one year and did not exceed 2 years in total unless permitted by delegation or approved waiver.	
		Delegation appropriately retained and used at appropriate HQ level. (See OPM letter of delegation and agency procedures, if any.)	
		Interviews and documentation reflect authority used appropriately.	

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Y	N	Review Item	Comments
Case File Summary/Comments:			

Reviewer/Title: _____ Date: _____