The All Important
CSA Number and Your Federal Annuity
by Nancy Savage (1977-2011), Executive Director

What is a CSA Number?
The CSA number is a number that federal retirees receive when they are provided an annuity at the time of retirement. CSA is an acronym for Civil Service Annuity. The old Civil Service Administration became the Office of Personnel Management (OPM) in 1979. The CSA number basically is the number that the OPM uses to identify the annuitant’s retirement file and accrued benefits. It is also referred to by OPM as the annuitant’s claim number. Basically think of the CSA number as similar to a Social Security Number (SSN), which identifies someone’s Social Security benefits. The CSA number will read CSA followed by a 7 digit number and a suffix of Zero or CSA XXXXXXX 0.

Where do I find my CSA number?
There are three places where you will find your CSA Number.

Retirement Services Reference Card
OPM sends each retiree a small card with the CSA number on it. The card looks similar to a Social Security Card. If you cannot find this card, no worries — there are two more places to find that all important number.

Annual Notice of Annuity Adjustment
Your CSA is also included in your OPM Notice of Annuity Adjustment that is sent to every annuitant in hard copy once a year, indicating how much your annuity will be for the upcoming year based on the cost of living increase. (Note this year, annuitants will not be receiving a cost of living increase, but should receive a notice just the same.)

OPM’s 1099R
OPM will issue each annuitant in January a paper 1099R which reflects their payment of annuity for the previous year. This 1099R is filed with your federal and state taxes much like a W2 form. The 1099 R form has the CSA number on it under Account number or (Retirement Claim Number).

Survivor Annuitants
When the survivor of an annuitant advises OPM of the death of their spouse and files for a survivor annuity, OPM will issue them their own CSF number, which refers to their survivor annuity. The CSF number will consist of CSF followed by seven digits and the letter W as a suffix. It will read CSF XXXXXXX W. The survivor annuitant will receive a Retirement Services Reference Card with a CSF number, Notice of Annuity Adjustment each year and a 1099R.

On Line Account with OPM
When you have either a CSA or CSF number, it is highly recommended that you go to www.opm.gov/retire and establish an on-line account so that you can download your own 1099R form in January, change deductions, etc. OPM is not easy to contact and the online services generally work well once your account is set up. You can attempt to call them at 1-888-767-6738 between 7:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday. You can also contact them using email at retire@opm.gov.

CSA Number and Your Family
Make sure your spouse and/or person in charge of your estate is knowledgeable about your CSA number.

Annuitant

Survivor Annuitant

On Line Account with OPM
Dear JAMIE DOE,

The amount we are paying you has changed. This letter provides your new monthly annuity rate and information about any adjustment reflected in your April 1, 20xx payment, which pays your annuity for the month of March. Please keep this notice for your records. We will mail you another notice the next time your payment amount changes.

$ ___________ Gross Monthly Annuity

$ ___________ Health Benefits Premiums for SAMBA

$ ___________ The amount of federal income tax withheld from your annuity changed because your annuity amount has changed or you have submitted a revised withholding request.

$ ___________ We are deducting Virginia income tax as you requested

$ ___________ Federal Long Term Care Insurance (LTCFEDS)

$ ___________ NET MONTHLY ANNUITY

If you have questions about this notice, you may call the Retirement Information Office at 1-888-767-6738 between 7:30 a.m. and 5:00 p.m. Eastern time, Monday through Friday and speak to a Customer Service Specialist. Please call us at 202-606-0500 if you live within local calling distance of Washington, DC. You may also contact us using email at retire@opm.gov.

Go to www.servicesonline.opm.gov to find out how to receive your IRS 1099R, annual mailer and other informational alerts electronically.

A great deal of retirement information is available online at www.opm.gov/retire.

Retirement Services