

GUIDE 08 / PREPARE YOUR EVIDENCE

Agency and OPM communication log

Keep requests, responses, deadlines, and submission receipts in one reliable record.

What you will leave with: Leave with a usable contact log and a clear next action for every open request.

Use this guide with current official instructions. Complete worksheets privately; do not send sensitive information through the website.

Separate your log from the official record

Your communication log is a personal management tool. It does not prove that a request was received, extend a filing deadline, or replace an official decision. Keep the actual email, letter, portal confirmation, attachment, or receipt behind each entry. A contemporaneous note helps you remember a phone call, but it should be labeled as your note rather than presented as a statement signed by an agency representative.

Keep sensitive identifiers in a secure private file. Do not put a claim number, Social Security number, date of birth, home address, or medical history in a public worksheet or staging-site field. Use a neutral reference in the log and consult the original when an authorized agency channel requires identifying information.

Create the core log

Field	What to capture
Date and channel	When the email, call, letter, or portal action occurred.
Office and role	HR benefits office, supervisor, payroll, OPM, or another responsible office.
Purpose	One specific request or question.
Result	Confirmed information, promised action, or no response.
Evidence location	Saved message, attachment, receipt, or dated call note.
Next action	Who will do what and when.
Status	Open, awaiting response, completed, or needs clarification.

Use a separate row for each meaningful exchange. When a response completes only part of a request, keep the remaining item open. "HR replied" is less useful than "HR sent SF 3112B; SF 3112D remains pending."

Send a request that is easy to answer

1. Identify the correct office and verify its contact channel through your agency or OPM's official website.
2. State the request in plain language and name the document or action. For example, ask who is responsible for completing the agency portions of SF 3112.

3. Provide the context needed for that request through the authorized channel, avoiding unrelated medical detail.
4. Ask for the expected next step and whether another office is responsible.
5. Save the sent message and attachments, then create a follow-up reminder. A personal reminder is not an official deadline.

Track application movement carefully

Current OPM FERS instructions direct employees to their agency HR office to begin a disability-retirement application through ORA and direct separated applicants to OPM's ORA process. Verify the current instructions for your situation rather than relying on routing directions printed in an older form. A log can track agency forms, portal submission, requests for additional information, and confirmation that an item was received.

Record official due dates exactly as stated in the notice and keep the notice itself. If instructions are unclear or a deadline is approaching while records are missing, seek prompt clarification from the issuing office and appropriate professional advice. Do not assume a pending request, unanswered email, or telephone assurance changes a deadline.

Work through a fictional example

Fictional worked example

Morgan emails HR on September 3 asking who will complete SF 3112D and SF 3112E. HR replies September 5 naming the benefits specialist and requesting a document. Morgan saves both messages, sends the requested item September 6, and logs its delivery. A September 10 response supplies SF 3112D only. Morgan marks that item received and leaves SF 3112E open, with a focused follow-up. The log says "document supplied," not "application approved."

- After a phone call, write the date, office, questions asked, and your understanding of the answer.
- When useful, send a courteous written follow-up summarizing your understanding and asking the office to correct it.
- Keep emotion and accusations out of the factual log; put personal reflections somewhere separate.
- Do not forward your entire medical file merely to ask for a status update.

Private prompts and closeout

Your private worksheet

Open request / responsible office / date first sent:

Official deadline, if any, and source notice:

Last confirmed response / saved evidence location:

Exact next question / next follow-up date:

What evidence will show this item is complete?

- ☐ Every open item has a next action.
- ☐ Receipts and original messages are saved.
- ☐ Official due dates are distinguished from personal reminders.
- ☐ Partial responses are not marked fully complete.
- ☐ Contact details were verified independently.
- ☐ Sensitive identifiers are absent from public notes.

Official sources

OPM: SF 3112, Documentation in Support of Disability Retirement Application · OPM: FERS types of retirement - disability retirement and current application instructions · OPM: Retirement application receipt and status

Reviewed October 14, 2026. Check current official sources before acting.

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