

BACKGROUND:

The Presidential Management Fellows (PMF) Program is a government-wide, cost recoverable program, providing talented recent graduates (Finalists) to participating Federal agencies. Finalists are appointed as Fellows into a 2-year excepted service appointment under the Pathways Programs Schedule D Hiring Authority. The PMF Program Office is administered by the U.S. Office of Personnel Management (OPM), per Executive Order 13562 of December 27, 2010, and 5 CFR 362.

When an agency appoints a Finalist into a PMF position, the agency must reimburse the PMF Program Office via a one-time placement fee that covers the recruitment, assessment, selection, and placement costs for Finalists entering into PMF appointments; for PMF Program Office operations and support to stakeholders; for various training and developmental opportunities of stakeholders; and for the PMF website and automated systems (e.g., the PMF Talent Management System). **Reimbursement is due within 30-days after a Finalist has been made and accepted a tentative PMF appointment offer.** PMFs may not be permitted to participate in PMF Program Office sponsored events (e.g., Orientation, PMF Training Forums, PMF LDP (Leadership Development Program) and Graduation) until the reimbursement is received. The bulk of the PMF Program's expenses are incurred during the recruitment cycle (e.g., annual PMF application and assessment process, adjudication, and selection of Finalists). It is critical for agencies to reimburse the PMF Program Office timely in order to cover these expenses.

Participating Federal agencies are those who have entered into a Pathways MOU (Memorandum of Understanding) or an MOA (Memorandum of Agreement) for those agencies in the excepted service or outside of the Executive Branch. A list of agency responsibilities can be found under the [Agencies\Agency Responsibilities](#) section on the PMF website at www.pmf.gov.

To facilitate the reimbursement to the PMF Program Office, an agency is to initiate an InterAgency Agreement (IAA) with OPM by utilizing the FS Forms 7600 A & B. These FS forms are the preferred method for establishing an IAA per the U.S. Department of Treasury's Bureau of the Fiscal Service (FS), previously referred to as the Financial Management Service (FMS).

The IAA is comprised of two sections:

- (1) The FS Form 7600A serves as the "General Terms and Conditions (GT&C) Section" of the form (establishing the agreement), and
- (2) The FS Form 7600B serves as the "Order Requirements and Funding Information (Order) Section" of the form (the funding document).

Additional instructions may be found on the Treasury's [Financial Management and Budget Standardization](#) website. Treasury's instructions are general; whereas, these instructions are specific to the PMF Program and OPM.

The agency/sub-agency's program office who initially appointed the Finalist into a PMF position is responsible for initiating the reimbursement to OPM's PMF Program Office. Additional guidance may be available by contacting the agency's official Pathways Programs Officer and the Agency PMF Coordinator. A [list of Agency PMF Coordinators](#) may be found under the "Agencies" section on the PMF website at www.pmf.gov or by contacting your agency's Human Resources (HR) Office.

In the event of a PMF reappointment (transfer or reassignment) to another PMF position\agency within the first 6 months of the Fellow’s appointment, statute §362.406(d) states the original appointing agency may request reimbursement of one-quarter of the placement fee from the new appointing agency. In such situations, the PMF Program Office is not involved; the obligation to submit the full PMF reimbursement is still the responsibility of the original appointing agency.

INSTRUCTIONS:

FS Forms 7600 A & B may be found under the [Agencies\Resources](#) section on the PMF website at www.pmf.gov; which are pre-populated with PMF Program specific information, including our accounting data. Please utilize the forms from the PMF website for every submission, as information on the forms or the forms themselves are subject to change. Agencies who submit obsolete forms may incur delays or be subject to resubmission with the correct forms.

FS Form 7600A Instructions – This is the “General Terms and Conditions (GT&C) Section” for creating an IAA.

1. Please review the FS Form 7600A in its entirety. Please consult with your financial office on how to properly complete this form for submission to OPM’s PMF Program Office.
2. The 7600A establishes the legal foundation for the relationship between the requesting and servicing agencies. It identifies the agencies entering into the agreement, the authority permitting the agreement, and the agreement action, period, and type. The 7600A may support multiple 7600Bs (Orders).
3. **NOTE:** When using the forms from the PMF website, several boxes have been pre-populated (as the Servicing Agency) for your convenience.
4. You may use the table below as a checklist and as a reference when filling out the boxes:

| <input checked="" type="checkbox"/> | Box #: | Field Name: | Instructions: |
|-------------------------------------|--------|--|--|
| | | IAA Number | Enter your agency’s InterAgency Agreement Number. GT&C # refers to the “General Terms & Conditions” number your agency may assign. |
| | 1 | Name and Address | Enter the requesting agency’s name and mailing address. Specific office name can be identified on the FS Form 7600B. |
| | 2 | Servicing Agency Tracking Number | This optional field is where the PMF Program Office would enter its own internal tracking number after receiving the completed 7600A. |
| | 3 | Assisted Acquisition Agreement | For the purpose of reimbursing the PMF Program Office for a PMF appointment, this should be checked as “No”. |
| | 4 | GT&C Action | Check “New” if this is a new IAA. Check “Amendment” if the GT&C is being amended. Check “Cancellation” if the IAA is being canceled, provide a brief explanation, and complete the “End Date” for when effective. |
| | 5 | Agreement Period | Enter the period during which the requesting agency expects all Orders (FS Form 7600B’s) to be completed by the servicing agency. The IAA becomes effective when both parties have signed. The end date can be up to 5 years. |
| | 6 | Recurring Agreement | Check “Yes” if this is a recurring agreement that will be renewed on a regular basis, unless a notice to discontinue is received. If checked, then check if an annual renewal or other renewal. Check “No” if not a recurring agreement. |
| | 7 | Agreement Type | Each IAA is for one reimbursable agreement between both agencies and will have one GT&C and one or more supporting Orders (FS Form 7600B). This is to identify if there is one or more Orders to support this GT&C. |
| | 8 | Are Advanced Payments Allowed for this IAA | Check “Yes” if advance payments are allowed for this IAA. If checked, then state the requesting agency’s specific authority that allows advances. Check “No” if advances are NOT allowed for this IAA. |
| | 9 | Estimated Agreement Amount | The placement fee for each Finalist appointed as a PMF (from the Class of 2011>) is \$7,000. If this FS Form 7600A is covering multiple PMF reimbursements, adjust the “Total <i>Estimated Amount</i> ” accordingly. |
| | 10 | Statutory Authority\ Requesting Agency’s Authority | Check the appropriate box. For the PMF Program, the most common statutory authority for agencies to submit reimbursement is under the “Revolving Fund”, citing 5 USC 1304(e). |

| <input checked="" type="checkbox"/> | Box #: | Field Name: | Instructions: |
|-------------------------------------|--------|----------------------------|--|
| | 23 | Agency Official\Signatures | The requesting agency must identify the requesting agency's official by name, title, telephone number, fax number, and email address. In addition, the official must sign and date the form. OPM prefers to receive electronically signed submissions. |

5. The PMF version of the FS Form 7600A on the PMF website includes the following boxes pre-populated:
 - a. Box 1: Servicing Agency Name and Mailing Address.
 - b. Box 9: The placement fee and general explanation of the fee.
 - c. Box 10: The statutory authority of "Revolving Fund" and citation for the PMF Program.
 - d. Box 11: The scope is pre-filled for the requesting agency.
 - e. Box 12: Refers to the roles and responsibilities as outlined and posted on the PMF website.
 - f. Box 23: Servicing agency's financial contact title, phone number, fax number, and email address.
6. Once the FS Form 7600A is filled out and signed, the requesting agency is asked to email the form to pmffee@opm.gov.
7. Upon receipt, the PMF Program Office will review for accuracy, assign and insert a tracking number, sign, and provide a copy back to the requesting agency.

FS Form 7600B Instructions – This is the "Order Requirements and Funding Information" (Order) used against the 7600A.

1. Please review the FS Form 7600B in its entirety. You may need to consult with your financial office on how to properly complete this form for submission to OPM's PMF Program Office.
2. The 7600B is the funding source that creates the fiscal obligation when the requesting agency appoints a Finalist to a PMF position. The requesting agency must submit a completed 7600 A and B within 30 days of a Finalist accepting a tentative PMF appointment offer. A 7600B cannot be submitted without a prior or accompanying 7600A.
3. **NOTE:** When using the forms from the PMF website, several boxes have been pre-populated (as the Servicing Agency) for your convenience.
4. You may use the table below as a checklist and as a reference when filling out the mandatory boxes:

| <input checked="" type="checkbox"/> | Box #: | Field Name: | Instructions: |
|-------------------------------------|--------|---|--|
| | | IAA Number and Servicing Agency's Tracking Number | Enter your agency's InterAgency Agreement Number. GT&C # refers to the "General Terms & Conditions" number your agency may assign. The PMF Program Office will add an internal tracking number. |
| | 24 | Requesting Agency | Enter the requesting agency's primary organization\office name and mailing address. This can be different than the name in the 7600A. |
| | 25 | Order Action | Check "New" if this is a new Order. Check "Modification" if this Order is being modified. Check "Cancellation" if the Order is being canceled, provide a brief explanation, and complete the "Performance Period End Date" for when effective. The pre-populated form shows "New" checked by default. |
| | 26 | Funding Modification Summary by Line | Complete this block for modifications that add, delete, or change funding information. |
| | 27 | Performance Period | Enter the performance period. |
| | 28 | Order Line/Funding Information | Enter the requesting agency's funding information. NOTE: The PMF version on the PMF website is prepopulated with the OPM\PMF Program Office funding information. Funding information may be different by class\fiscal year. - ALC = Agency Locator Code, - TAS = Treasury Accounting Symbol, - BPN = Enter DUNS Number |
| | | Description of Products and/or Services | The requesting agency must enter the PMF's Name (first and last name), Class Year (if known), and Entry on Duty (EOD) Start Date (if known). This is where the agency identifies the PMF(s) being reimbursed. |
| | | Breakdown of Reimbursable Line Costs | The requesting agency is to identify the quantity and unit price being covered by this Order (e.g., \$7,000 per PMF placement). |
| | | Type of Service Requirements | Check the "Not Applicable" box as this is not applicable to the PMF Program. |

| <input checked="" type="checkbox"/> | Box #: | Field Name: | Instructions: |
|-------------------------------------|--------|---------------------------------|--|
| | 30 | Total Net Order Amount | Enter the total net order amount (e.g., full value of this Order). |
| | 32 | Payment Method | Check the "Servicing Agency Initiated IPAC" box. The PMF Program Office will initiate the IPAC upon a successfully executed FS Forms 7600 A & B. |
| | 33/34 | Billing and Payment Information | Reimbursement is due within 30 days for each PMF appointment (e.g., upon a Finalist accepting a tentative PMF appointment offer). |
| | 37 | Program Officials | Enter the requesting agency's "Program Official" to include Name, Title, Work Phone Number, Work Fax Number, Work Email Address, and then electronically sign and date. |
| | 38 | Funding Officials | Enter the requesting agency's "Funding Official" to include Name, Title, Work Phone Number, Work Fax Number, Work Email Address, and then electronically sign and date. |
| | 39 | Finance Office | Enter the requesting agency's "Finance Office" point of contact to include Name, Title, Office Mailing Address, Work Phone Number, Work Fax Number, Work Email Address, and then, if needed, electronically sign and date. |

5. The PMF version of the FS Form 7600B on the PMF website includes the following boxes pre-populated:
 - a. Box 24: Servicing Agency Name and Mailing Address.
 - b. Box 28: Servicing Agency Funding Information and Description of Products and/or Services.
 - c. Box 33: Billing Frequency to reflect "Due 30 days for each PMF apt."
 - d. Box 34: Payment Terms to reflect "Due 30 days for each PMF appointment."
 - e. Box 37: Program Official to include Name, Title, Work Phone Number, Work Fax Number, and Work Email Address.
 - f. Box 38: Funding Official to include Name, Title, Work Phone Number, Work Fax Number, and Work Email Address.
 - g. Box 39: Finance Office Point of Contact to include Name, Title, Work Mailing Address, Work Phone Number, Work Fax Number, and Work Email Address.
6. Once the FS Form 7600B is filled out and signed, the requesting agency is asked to email the form to pmffee@opm.gov.
7. Typically agencies fill out both the 7600A and 7600B and submit both simultaneously. See instructions above for the 7600A.
8. Upon receipt, the PMF Program Office will review for accuracy, assign and insert a tracking number, sign, and provide a copy back to the requesting agency.

Please digitally sign the forms and email to the PMF Program Office via pmffee@opm.gov. If digital signatures are not possible, please electronically scan for submission. Any FS Form 7600B that is submitted without an associated FS Form 7600A attached or already on file will be suspended until such 7600A form is received; we will notify the requesting agency, if applicable. Please contact us if you have any questions by sending an email to pmffee@opm.gov.

Sample FS Forms 7600 A & B that are pre-populated from the PMF Program Office (as the Servicing Agency) can be found under the [Agencies\Resources](#) section on the PMF website at www.pmf.gov.