

Customer Online Tools Information Guide for Annuitants

DFAS Retired and Annuitant Pay has been working hard to make the customer experience with us easier and with better communication. The [Retired Military & Annuitants \(dfas.mil\)](#) webpage is a great place to start to learn about all of these updates. Our webpage contains useful information to keep you up to date on all of the potential changes that could impact your pay account with our News and Event section as well as our Survivor SBP newsletter. You can also read about Retired and Annuitant Pay and managing your annuity account.

The webpage also has helpful links for additional information to keep you connected:

Facebook: [Defense Finance and Accounting Service - DFAS | Facebook](#)

YouTube: <https://www.youtube.com/DFAS>

askDFAS: [Defense Finance and Accounting Service > AskDFAS](#)

myPay: [myPay Web Site \(dfas.mil\)](#)

Form Wizards

We have a **Forms** section that will allow you to save the forms you need to your home computer. We are also developing new form tools to make the process of completing a form easier for you. The new **Form Wizards** “take the form out of the form” by walking you through the information needed to help ensure that all necessary fields are completed properly. These **Form Wizards** also have a helpful link to submit the form through a customer-facing askDFAS online submission tool for that category of requests.

askDFAS Online Upload Submission Tool

We have also been working on a better way for you to submit your requests. askDFAS is part of the DFAS.mil website. askDFAS lets you submit questions for us to answer. askDFAS now has the ability to accept specific form requests for us to process. Simply create an askDFAS ticket and upload the form you want to submit. The DFAS.mil site offers step-by-step guides to walk you through the process of submitting a form to askDFAS. There is a guide for each form.

Status Notifications

When you submit your request, we are starting to send status notification that will keep you updated on the progress of your request. The email notifications will provide better communication to you and assure you that your request has been received and is being processed. We will send you updates when we receive your request, when the request has been assigned, and when the request has been completed.

myPay

You can make changes to your account using myPay. myPay is an innovative, automated system that puts you in control of processing certain discretionary pay data items without using paper forms. You can also get your pay and tax statements using myPay.

myPay saves time - myPay eliminates the need to call, write letters or fill out forms by letting you make your own changes immediately with user-friendly technology.

myPay is convenient - You can access myPay nearly 24 hours a day, 7 days a week to change or review your current information, or to check your most recent pay statement.

myPay is reliable – The information you input transfers directly to your pay system.

What is askDFAS?

askDFAS is part of the www.DFAS.mil website providing responsive services to you. Our site lets you request support by asking questions for us to answer, request tax documentation, and now to send us forms for processing on your pay account.

Submit Your Forms in askDFAS!

Retired and Annuitant Pay developed a user-friendly online upload tool to allow you to submit forms and requests to provide better communication to you. Individual category requests can now be submitted via the Helpful Online askDFAS Submission Tool located on www.DFAS.mil.

The new askDFAS submission tool was established to improve the way requests are submitted and eliminates the time sending requests through mail or fax. You can now send your forms from your home computer.

To send us a form request, simply click on the **Submit A Ticket** button on the askDFAS.mil homepage. You will then click on the arrows next to **Retired Pay Form Submissions**. A list of forms will appear with all of the submissions available.

Look for the askDFAS icon at the top of the DFAS.mil webpage to get started or use the link below.

Try askDFAS: <https://corpweb1.dfas.mil/askDFAS/custMain.action?mid=12>

Email Status Notifications

Email Status notifications are here! We are starting to send status notifications with progress updates on your requests.

We will send you updates when:

1. When we **receive** your request
2. When your request has been **assigned** for processing
3. When the request has been **completed**.
 - a. We received all information needed and your request was completed
 - b. We were **not able to complete** your request. A letter will be mailed requesting the additional information.

If you send a form to us using askDFAS, we will send updates to you using the email address provided on the askDFAS ticket you submit to us.

Submit Forms using askDFAS

Forget about trying to find a fax machine. You can submit certain forms and supporting documentation at home with askDFAS <https://corpweb1.dfas.mil/askDFAS/custMain.action?mid=12>

How does the submission process work?

You can submit a request by creating an askDFAS ticket and attaching your form or documentation to the ticket. When you complete and submit the ticket, the documentation will then be uploaded to our system for processing.

You will receive an automated email confirming your ticket has been created with a link to view your ticket in the future.

How long does it take?

Once you submit your request, it will take up to 3 business days to be available in our system to review the request. We can process a typical request in 30 – 60 days if we have all of the required information once received.

What is the benefit of submitting requests via askDFAS?

We are working hard to make it as easy as possible for you to submit a request. With the new submission tool, we are trying to stop the need for you to leave your home to go to the post office or to find a fax machine.

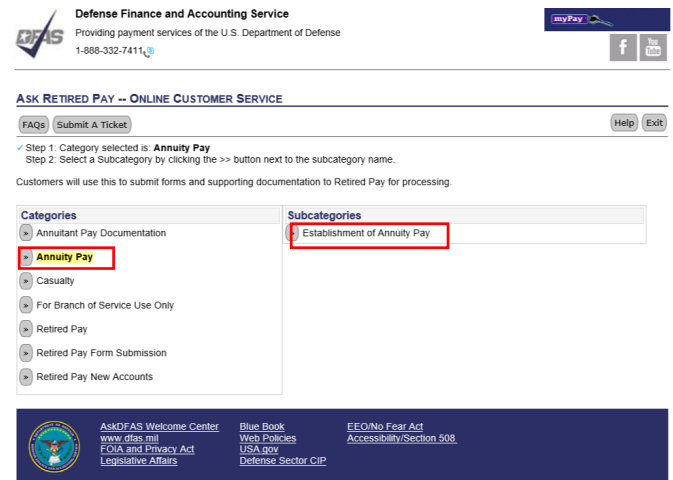
What if my request is not listed as an option in askDFAS?

If the current list of submission options is not available in askDFAS, please log into your myPay account. myPay offers additional features that can assist you in making changes to your pay account without you having to leave your home.

Helpful Online Tools for Annuitants

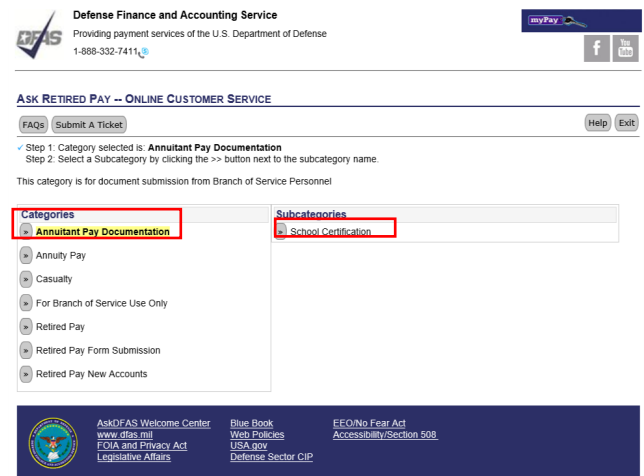
Supporting Documentation

- ◆ The askDFAS **online upload tools** will also allow for up to two additional forms to be uploaded and submitted through askDFAS on the DFAS.mil website with the annuity application. The most common would be your direct deposit and tax withholding information.
- ◆ The submitted requests will be available for processing within 72 hours of submission.



Child Annuitant School Certification

- ◆ You can upload DD Form 2788, Child Annuitant School Certification via the AskDFAS **online upload tool** on DFAS.mil.
- ◆ The **Annuitant Pay Documentation** category in askDFAS allows for the child annuitant to upload their school certification for processing.
- ◆ The email address used to complete the askDFAS ticket will now provide status notifications updating you on the progress of the annuity application.



Annuitant Form Wizard Uploads

- ◆ The DD Form 2788 has a Form Wizard available for use on the DFAS.mil Forms page. <https://www.dfas.mil/RetiredMilitary/forms/>
- ◆ Use of the Form Wizards can allow for a direct upload to the askDFAS online upload tool.
- ◆ The Form Wizards also provide the convenience to sign using electronic signature versus having to print the form, provide a wet signature and rescan.

Annuity Assistance:			
Annuitants' Startup Forms			
DD 2788 Form Wizard			
DD 2788 Printable PDF Form	Child Annuitant's School Certificate		How-To Checklist
Helpful tools and how-to information			
DD 2790			Instructions
DD 2790	Custodianship Certificate of Minor Child		How-To Checklist
Helpful tools and how-to information			
FMS 2231	Fast Start Direct Deposit		
SF 1199A	Direct Deposit Enrollment		
IRS W4P	IRS Withholding Certificate for Pension of Annuity Payments		
IRS W-8BEN	Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding		
DD 2828	Physician Certificate for Child Annuitant		Instructions
DFAS 9415 Fillable - Use this version to fill in the form on your computer. You will need PDF software to use this version.			Instructions
DFAS 9415 Print Only - Use this version if you want to print out and fill in the paper form.	Representative Payee Certification		How-To Checklist
Helpful tools and how-to information			
DD 2656-7 Form Wizard			Instructions
DD 2656-7 Printable PDF Form	Verification for Survivor Annuity		How-To Checklist
Helpful tools and how-to information			

Status Notifications for Submitted Requests

Throughout the year, DFAS has been rolling out the use of status notifications to keep you in the loop as forms or documents you submit move through the retired and annuity pay processing cycles.

How Do Status Notifications Work?

Status notifications are a three-step process that will update you when DFAS receives certain forms or documents for processing through askDFAS. You will receive separate status notifications when your form or document is:

1. **Received and queued** in the DFAS work system
2. **Assigned to be worked**
3. **Completed** - Either a notification the processing is complete or a notification that DFAS is sending a request for additional information.

What is the Benefit of a Status Notification?

Status notifications will give you peace of mind that we received your form or request. They will also provide you with the timeframe when we completed your request or notify you if additional information is required. If we do need additional information, you will know to watch for mail, with specific information about what we need to complete your request.

What You Need to Do to Receive Status Notifications

To receive these status notifications for askDFAS submissions, please ensure your email address is typed in correctly when you submit the askDFAS ticket. The email address on the askDFAS ticket will be used to send the status notifications with updates for the submitted request

Visit the Retired Military and Annuitant website!

<https://www.dfas.mil/RetiredMilitary/>

Here you can find important information to keep you up-to-date and to answer questions you may have.

R&A Pay - Find out more about who we are and what we do

<https://www.dfas.mil/RetiredMilitary/about/aboutus/>

We serve a community of 2.9 million military retirees and their eligible surviving annuitants. Our commitment is to pay our customers on time and accurately, every time. We strive to do this with the highest levels of integrity, customer service and friendliness.

Read our Newsletter!

Stay informed by reading our twice-yearly Survivor SBP newsletter! Here you will find important information to keep you up-to-date on all of the changes happening. The newsletter includes important information that will help you prepare when you need to take action. We also include the enhancements we have implemented to assist you with your annuity pay account.

Forms Available

<https://www.dfas.mil/RetiredMilitary/forms/>

We have the forms you need all in one place. The forms page provides a categorized list of forms with a description of each form.

Form Wizards – Taking the form out of the form!

R&A Pay has been working to develop new form tools to help you fill out and submit required forms correctly and more easily. The form wizard offers step-by-step instructions to fill out the form and making sure no important information is missed.

Use myPay to your advantage

<https://myPay.dfas.mil>

myPay is a user-friendly way to manage your pay account. You can easily manage your account using the web browser on your computer or with a connected device like your smartphone or tablet.

If you're not yet using myPay, it's easy to get started. We have a handy step-by-step, downloadable "Get Started with myPay" guide available at: <https://www.dfas.mil/RetiredMilitary/manage/mypay/>

How long does it take to process a request? <https://www.dfas.mil/RetiredMilitary/about/How-Long-Does-It-Take/>

We work hard to process your requests accurately and promptly. R&A Pay offers processing timeframes based on your request. We can process a typical request in 30 – 60 days if we have all of the required information.

How Can I Manage My Annuity Pay Account?

It's easy to get started with myPay. <https://myPay.dfas.mil>

What is myPay?

myPay is a user-friendly way to manage your pay account. You can easily manage your account using the web browser on your computer or with a connected device like your smartphone or tablet. myPay is an innovative, automated system that puts you in control of processing certain discretionary pay data items without using paper forms.

Why should I use myPay?

myPay saves time - myPay eliminates the need to call, write letters or fill out forms by letting you make your own changes immediately with user-friendly technology. myPay is convenient - You can access myPay nearly 24 hours a day, 7 days a week to change or review your current information, or to check your most recent pay statement. myPay is reliable – The information you input transfers directly to your pay system.

When is myPay available?

myPay is available nearly 24 hours a day, 7 days a week. myPay has periods of unavailability due to scheduled DFAS pay system maintenance windows. Please refer to the System Availability section located on the myPay homepage for updates on impacted systems and customers. With myPay, annuitants have the options provided below.

Statements and tax documents:

- View/print/save an Annuitant Account Statement
- View/print/save a current year IRS Form 1099-R and up to two prior year 1099-Rs
- View/print/save IRS form 1042S
- Print/save a Certificate of Eligibility
- Print/save a Report of Existence

Annuity Pay account updates:

- Change mailing address or email address
- Change federal tax withholding
- Change Direct Deposit information
- Submit a Certificate of Eligibility
- Submit a Report of Existence

myPay account options:

- Set up a Limited Access Account
- Newsletter Alert Notifications - turn on/off
- Tax Statement Alert Notifications - turn on/off
- Change login ID or password for myPay
- Password on Demand for myPay, including online password reset
- Add/Change Mobile Number for receiving text messages
- Manage Two-factor Authentication settings

What Is a Form Wizard? What Are the Benefits?

The Form Wizards “take the form out of the form” by having the annuitant answer a series of questions. Once the questions are answered, the wizard automatically places the answers in the correct areas of the form and generates a ready-to-print PDF of the completed form. Users can also save a PDF of the generated form to their own computer.

Some Form Wizards allow for electronic signature capability. The electronic signature option allows the annuitant to electronically sign this form in place of a handwritten signature.

Electronic signature makes the process of completing and submitting the form much easier for annuitants because they can fill it out, sign it, and authenticate it online and then upload it online to askDFAS on DFAS.mil instead of having to print out a form, sign it, and then scan it to upload it online.

Available Form Wizards for annuitants available on <https://www.dfas.mil/RetiredMilitary/forms/>

- **DD2656-7** Verification For Survivor Annuity
- **DD2788** Child Annuitant’s School Certification

Annuity Assistance:		
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DD 2788 Printable PDF Form Helpful tools and how-to information	Child Annuitant's School Certificate	How-To Checklist
DD 2790 Helpful tools and how-to information	Custodianship Certificate of Minor Child	Instructions How-To Checklist How-To Video
FMS 2231	Fast Start Direct Deposit	
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DD 2656-7 Form Wizard		
DD 2656-7 Printable PDF Form Helpful tools and how-to information	Verification for Survivor Annuity	Instructions How-To Checklist How-To Video

I Want To Upload a Form. How Do I Start?

1. Below is the current list of forms that you can submit directly to askDFAS. Check back often as we continue to add more forms to submit.
2. The forms are available on our **Forms** page and can be saved to your computer.
<https://www.dfas.mil/RetiredMilitary/forms/>
3. Once you complete the form, you can send us the form with the matching subcategory option in askDFAS.
[Defense Finance and Accounting Service > AskDFAS](#)

List of annuitant forms available for askDFAS submission:

- **DD2656-7** Verification For Survivor Annuity
- **DD2828** Physician Certificate for Child Annuitant
- **DD2788** School Certification
- **DFAS 9415** Representative Payee Certification



Defense Finance and Accounting Service

Providing payment services of the U.S. Department of Defense

1-888-332-7411



ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE

[FAQs](#) [Submit A Ticket](#)

[Help](#) [Exit](#)

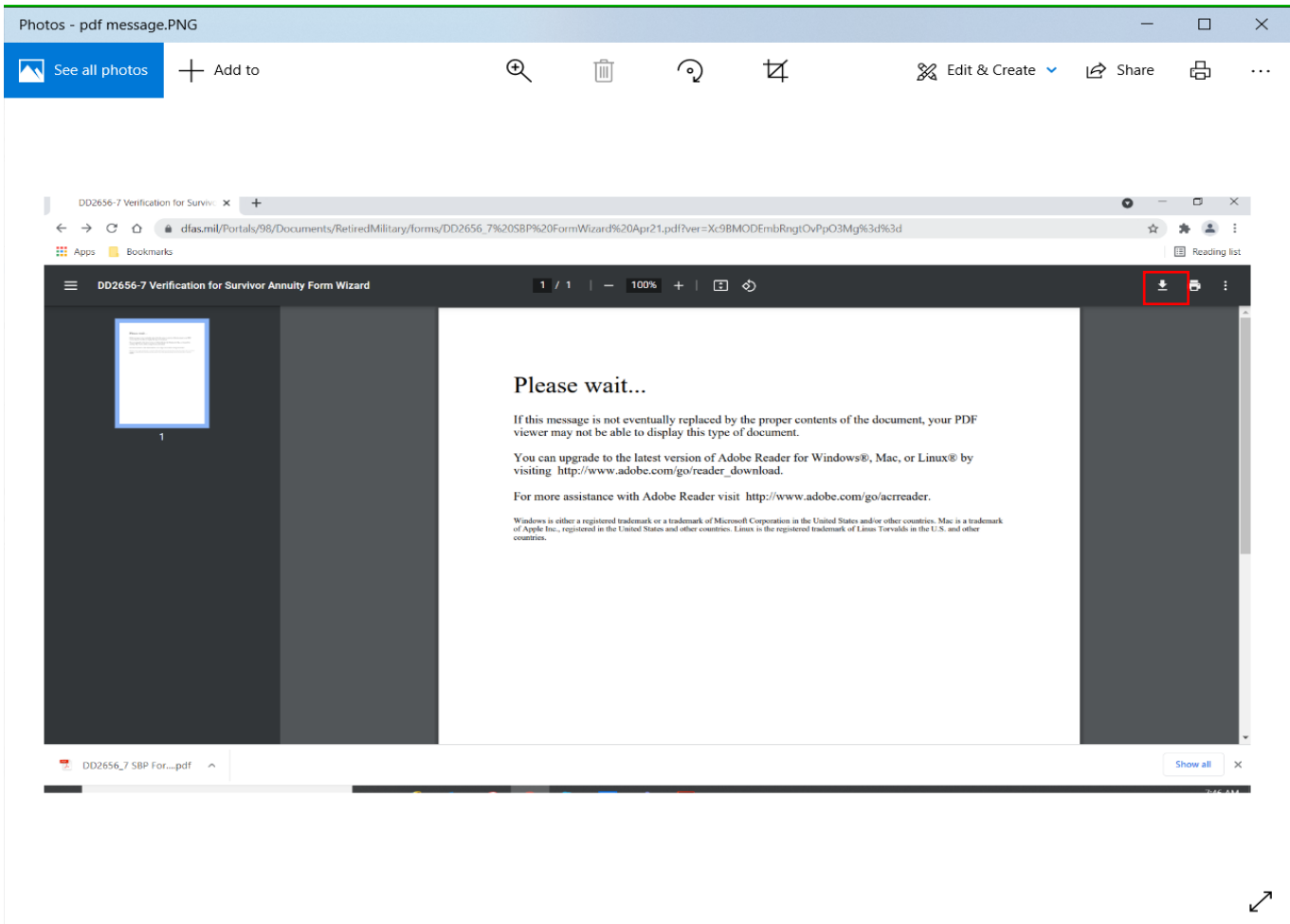
- ✓ Step 1: Category selected is: **Annuity Pay**
- Step 2: Select a Subcategory by clicking the >> button next to the subcategory name.

Annuity Pay

Categories	Subcategories
<input type="radio"/> Annuitant Pay Documentation	<input type="radio"/> Establishment of Annuity Pay
<input checked="" type="radio"/> Annuity Pay	
<input type="radio"/> Casualty	
<input type="radio"/> For Branch of Service Use Only	
<input type="radio"/> Retired Pay	
<input type="radio"/> Retired Pay Form Submission	
<input type="radio"/> Retired Pay New Accounts	

Please note:

When using Chrome, Edge, Firefox or Safari to access an Adobe form wizard, the user initially gets the attached message. The user must download the pdf (by clicking the download icon in the upper right-hand corner of the page), then double-click on downloaded file.



Do You Have Questions? How To Get Answers

Who do I contact with my question? <https://www.dfas.mil/RetiredMilitary/about/contact-who/>

The website makes it easy by listing the services provided by DFAS R&A Pay, Department of Veteran Affairs (VA) and the Branches of Service with contact information for your questions or concerns.