

askDFAS Reference Guide

*for Retirees and
SBP Annuitants*

Military Retired and Annuitant Pay

Defense Finance and Accounting
Service (DFAS)

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Overview – askDFAS + Customer Tools

What is askDFAS?

The askDFAS system is publicly available and accessible directly by URL and through the DFAS.mil website (<https://www.dfas.mil/>). The system allows for 24/7 online submissions and accommodates a variety of customer requests.

What is Ask Retired Pay?

Retired and Annuitant Pay Customers use the “Ask Retired Pay” module of askDFAS to submit requests.

The Ask Retired Pay module home page can be found here:

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

Defense Finance and Accounting Service
Providing payment services of the U.S. Department of Defense
1-888-332-7411

myPay

Ask Retired Pay -- ONLINE CUSTOMER SERVICE

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

Providing responsive, professional finance and accounting services for the people who defend America means delivering timely useful information. Our site allows customers the ability to request support or provide feedback. Every individual is unique, but they often face similar issues. Browse our frequently asked questions database before submitting a question for best results.

Retired and Annuitant Pay Customers: To upload a form or document, send us a question, report a death, or complete a self-service request, please click the "Submit a Ticket" button above and then choose the appropriate category and subcategory for your request.

Search (FAQs) from Ask Retired Pay: [Go](#) [Clear](#)

Category:

Subcategory:

No.	Category	Subcategory	Frequently Asked Question	Viewed	Viewer Rating
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After arriving at the home page, please click [Submit A Ticket](#) to get started with a submission.

You may also click [FAQs](#) to read a list of frequently asked questions that may address your needs without the need to submit a ticket.

Who uses Ask Retired Pay?

Users can include individual retirees or SBP annuitants, survivors/beneficiaries, Branch of Service (or other federal agency) pay partners, and other third parties.

What is available on Ask Retired Pay?

Ask Retired Pay is organized by category. Within each category, there are subcategories that must be selected based on the type of request.

Here is a brief overview of what is available on Ask Retired Pay:

Form Upload Tools

There are 2 categories where retirees and SBP annuitants can upload documents and submit them to DFAS Retired & Annuitant Pay for processing. The 2 categories are:

- Retiree - Form Upload Tools
- SBP Annuitant/Survivor - Form Upload Tools

The screenshot shows the 'ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE' web application. At the top, there are buttons for 'FAQs', 'Submit A Ticket', 'Help', and 'Exit'. Below the header, instructions state: 'Step 1: Category selected is: Retiree - Form Upload Tools' and 'Step 2: Select a Subcategory by clicking the >> button next to the subcategory name.' A note specifies: 'This category is for Military Retirees to upload documents to DFAS for processing.' The interface is divided into two columns: 'Categories' and 'Subcategories'. In the 'Categories' column, 'Retiree - Form Upload Tools' is highlighted with a yellow background. In the 'Subcategories' column, several options are listed, each with a '>>' button next to it, including 'Active Duty Retirement Ppww - Upload', 'DD 2558 - Allotment Updates - Upload', 'DD 2894 - Desig of Beneficiary - Upload', 'General Retiree Documents - Upload', 'Power of Attorney/3rd Party Doc - Upload', 'Reserve/Guard Retirement Ppww - Upload', 'Retiree DOHA Appeal - Upload', 'SBP DD 2656-1 - Upload', 'SBP DD 2656-2 - Upload', 'SBP DD 2656-6 - Upload', 'SBP DD 2656-8 - Upload', and 'Tax Withholding Changes - Upload'.

The screenshot shows the 'ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE' web application. At the top, there are buttons for 'FAQs', 'Submit A Ticket', 'Help', and 'Exit'. Below the header, instructions state: 'Step 1: Category selected is: SBP Annuitant/Survivor - Form Upload Tools' and 'Step 2: Select a Subcategory by clicking the >> button next to the subcategory name.' A note specifies: 'This category is for SBP Annuitants and Survivors to upload documents to DFAS for processing.' The interface is divided into two columns: 'Categories' and 'Subcategories'. In the 'Categories' column, 'SBP Annuitant/Survivor - Form Upload Tools' is highlighted with a yellow background. In the 'Subcategories' column, several options are listed, each with a '>>' button next to it, including 'DD 2656-7 - Claim SBP Annuity - Upload', 'DD 2788 - Child Ann School Cert -Upload', 'DD 2828 - Child Ann Phys Cert - Upload', 'DFAS 9415 - Ann Rep Payee Cert - Upload', 'General SBP Annuitant Documents - Upload', 'Power of Attorney/3rd Party Doc - Upload', 'SBP Annuitant DOHA Appeal - Upload', 'SBP-Marital Status Update - Upload', 'SF 1174 - Arrears of Pay (AOP) - Upload', and 'Tax Withholding Changes - Upload'.

Ask A Question

There are 2 categories for customers to submit a question to be answered by the DFAS Cleveland Customer Care Center. They are:

- Retiree - Ask a Question
- SBP Annuitant - Ask A Question

ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE

FAQs Submit A Ticket Help Exit

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

This category is for questions related to Retiree transactions. A member of the DFAS Cleveland Customer Care Center will answer your question electronically on the ticket.

Categories	Subcategories
> Report a Death / Survivor - Ask a Question	> Disability Entitlements – Questions
> Retiree - Ask a Question	> General / Form / Document - Questions
> Retiree - Form Upload Tools	> General Disability Pay - Questions
> SBP Annuitant - Ask A Question	> International Direct Deposit - Questions
> SBP Annuitant/Survivor - Form Upload Tools	> Payment Inquiry - Questions
> Self-Service Account Changes	> Survivor Benefit Plan - Questions
> Used ONLY by BoS/Fed Agency Partners-Form Uploads	> Verifications for Pay Partners-Questions

ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE

FAQs Submit A Ticket Help Exit

✓ Step 1: Category selected is: **SBP Annuitant - Ask A Question**
Step 2: Select a Subcategory by clicking the >> button next to the subcategory name.

This category is for questions related to SBP Annuitant transactions. A member of the DFAS Cleveland Customer Care Center will answer your question electronically on the ticket.

Categories	Subcategories
> Report a Death / Survivor - Ask a Question	> Annual Eligibility/School Cert-Questions
> Retiree - Ask a Question	> General / Form / Document - Questions
> Retiree - Form Upload Tools	> Payment Inquiry - Questions
> SBP Annuitant - Ask A Question	> Starting SBP Annuity Pay - Questions
> SBP Annuitant/Survivor - Form Upload Tools	> Verifications for Pay Partners-Questions
> Self-Service Account Changes	
> Used ONLY by BoS/Fed Agency Partners-Form Uploads	

Self-Service Requests

There is one category called “Self-Service Account Changes” and has functionality for both retirees and SBP annuitants to make certain requests instead of calling the DFAS Cleveland Customer Care Center or submitting a form.

The screenshot shows the 'ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE' web application. At the top, there are links for 'FAQs', 'Submit A Ticket', 'Help', and 'Exit'. Below the header, a message indicates that Step 1: Category selected is: Self-Service Account Changes, and Step 2: Select a Subcategory by clicking the >> button next to the subcategory name. A descriptive text states: 'This category allows Retirees and SBP Annuitants to request certain account changes by completing information on the ticket.' The interface is divided into two columns: 'Categories' and 'Subcategories'. In the 'Categories' column, 'Self-Service Account Changes' is highlighted with a yellow background. In the 'Subcategories' column, three options are listed: 'Mailing Address Update - Retirees', 'Mailing Address Update - SBP Annuitants', and 'Request Verification of Pay Letter'.

Categories	Subcategories
Report a Death / Survivor - Ask a Question	Mailing Address Update - Retirees
Retiree - Ask a Question	Mailing Address Update - SBP Annuitants
Retiree - Form Upload Tools	Request Verification of Pay Letter
SBP Annuitant - Ask A Question	
SBP Annuitant/Survivor - Form Upload Tools	
Self-Service Account Changes	
Used ONLY by BoS/Fed Agency Partners-Form Uploads	


Report a Death / Survivor Questions

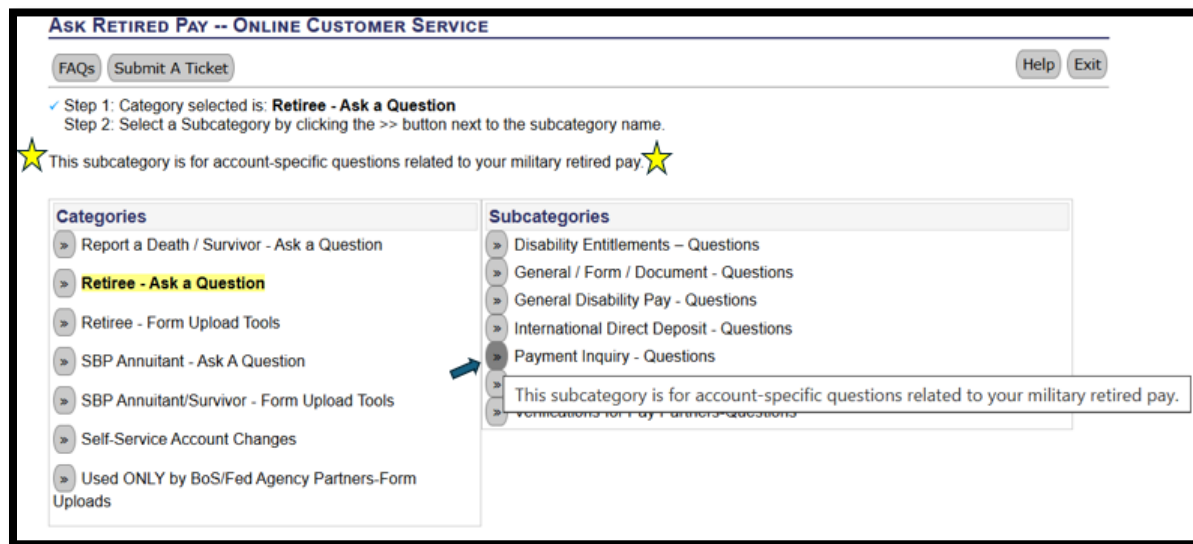
There is one category that allows customers to report a death (there is a subcategory to report the death of a retiree and another to report the death of an SBP annuitant), and it also includes an area for customer questions about the processes that follow a report of death.

The screenshot shows the 'ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE' web application. At the top, there are links for 'FAQs', 'Submit A Ticket', 'Help', and 'Exit'. Below the header, a message indicates that Step 1: Category selected is: Report a Death / Survivor - Ask a Question, and Step 2: Select a Subcategory by clicking the >> button next to the subcategory name. A descriptive text states: 'This category allows users to Report the Death of a Retiree or SBP Annuitant, and survivors can ask basic questions about the processes that follow the death of a loved one.' The interface is divided into two columns: 'Categories' and 'Subcategories'. In the 'Categories' column, 'Report a Death / Survivor - Ask a Question' is highlighted with a yellow background. In the 'Subcategories' column, four options are listed: 'Final Pay of Deceased Member - Questions', 'Report Death of an SBP Annuitant', 'Report the Death of a Retiree', and 'Starting SBP Annuity Pay - Questions'.

Categories	Subcategories
Report a Death / Survivor - Ask a Question	Final Pay of Deceased Member - Questions
Retiree - Ask a Question	Report Death of an SBP Annuitant
Retiree - Form Upload Tools	Report the Death of a Retiree
SBP Annuitant - Ask A Question	Starting SBP Annuity Pay - Questions
SBP Annuitant/Survivor - Form Upload Tools	
Self-Service Account Changes	
Used ONLY by BoS/Fed Agency Partners-Form Uploads	

Which Subcategory is the Best Fit for a Request?

On the category/subcategory selection screen, hovering the mouse cursor over the  icon of each subcategory displays helpful tips to direct submissions to the correct subcategory. Please see the photo below, as an example.



Each ticket also includes helpful verbiage on it to describe expected type of submissions within that subcategory.

How do you Submit a Request?

After selecting the proper category and subcategory, users must fill out a ticket with all required information. For customers using a Form Upload Tool, they must also select and upload the form(s)/document(s) they would like to submit to DFAS for processing.

There are examples of how to fill out a ticket presented later in this guide.

askDFAS Requirements

All fields denoted with an asterisk (*) on an askDFAS ticket are required.

For Form Upload Tools, there are additional requirements that files must adhere to:

- Please submit PDF Files ONLY (The system cannot process PDF Portfolios and will reject them).
- Any non-PDF file is prohibited. Examples include: Word, Excel, Image, or Text Files.
- If needed, please convert your file to PDF ("Save As" PDF or "Print To" PDF) before submitting.
- Ensure the Member's SSN is present (preferably on each page). For requests pertaining SBP Annuitant(s), please make sure the SSN(s) are present for SBP Annuitant(s) as well.
- There is a 35 MB file size limit per ticket. If your files exceed this amount, please submit the additional files on a separate ticket.
- Subcategory choice is important when choosing between "retiree" and "annuitant" subcategories

How Long Does It Take?

For Form Uploads, it will take up to 3 business days for your document(s) to be available in our processing system. We can process a typical request in 30 business days if we have all the required information upon submission.

For Questions and Self-Service Requests, you will receive a response within 3 business days.

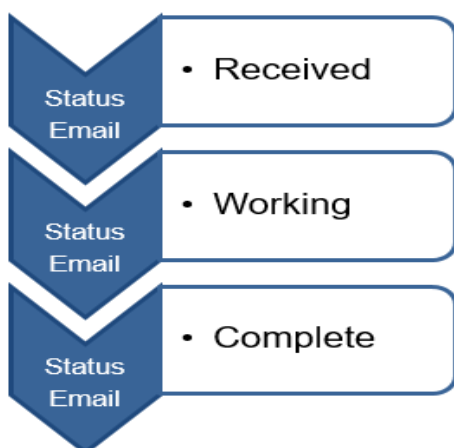
What are Status Notifications?

We have an email status notification system to provide retirees and SBP annuitants basic status information on certain requests submitted via mail, fax, or the askDFAS online form upload tools. For eligible transactions, customers will receive up to three notifications with progress of the submitted request.

1. Notification is sent when request is received.
2. Notification is sent when technician acquires the request for action.
3. Notification is sent when the work item is closed (either completed or follow-up is needed for additional information).

When a form/document is uploaded to one of the customer-facing askDFAS online form upload tools, askDFAS will send a series of status notifications to the email address provided in the ticket, if status notifications are enabled for the subcategory that was used. A list of subcategories set up to send status notifications can be found later in this guide.

When a customer submits an eligible request via postal mail or fax, status notifications can be sent to the email address on file in myPay (if available) for certain transactions that are enabled to send status notifications. Currently, there are over 50 types of transactions that are set up for mail/fax status notifications!



What are Form Wizards?

Retired and Annuitant Pay has a growing series of Form Wizards to make the process of completing a form easier for retirees and SBP annuitants. The Form Wizards “take the form out of the form” by walking the user through the information needed to help ensure that all necessary fields are completed properly. Several of these Form Wizards also have a helpful link to submit the form through the corresponding askDFAS online form upload tool.

Form Wizards

Currently, there are 6 Form Wizards available for customer use:

- **SF 1174** Arrears of Pay
- **DD Form 2894** Designation of Beneficiary
- **DD Form 2656-7** Verification for Survivor Annuity
- **DD Form 2788** Child Annuitant’s School Certificate
- **DFAS 9415** Representative Payee Certification
- **DD Form 2656-6** Survivor Benefit Plan Election Change Certificate

Electronic Signature and “One Click” askDFAS Integration is available for some Form Wizards. This convenient feature allows the user to electronically sign and upload the form. It eliminates the need for the user to print, provide their wet-ink signature, rescan, and then upload.

For the other Form Wizards that do not have “One Click” askDFAS integration, users will still receive the key benefit of receiving guided assistance filling out the form but must obtain physical signatures. Once this happens, the askDFAS Form Upload Tools can still be used for submission.

The following is the **list of Form Wizards with the convenient “One Click” askDFAS button** to submit using the askDFAS Form Upload tools.

- **DD Form 2894** Designation of Beneficiary
- **DD Form 2656-7** Verification for Survivor Annuity
- **DD Form 2788** Child Annuitant’s School Certificate

Explainer: Saving Active Forms into a Static PDF

Certain PDF files contain enhanced capabilities that allow users to fill in the form by typing directly into the fields, or logic-driven guidance that makes certain sections “gray out” when deemed not applicable due to prior responses on the form. With such files, it is best to make the PDF static before submitting via askDFAS. Forms with active features may become delayed in reaching the DFAS processing system. There is a guide to this process in a later section of this guide.

Other Tools, Links, and Resources

DFAS Retired and Annuitant Pay has been working hard to make your experience with us easier and with better communication. The Retired Military & Annuitants (dfas.mil) website is a great place to start to learn about all these updates. Our website contains useful information to keep you up to date on all the potential changes that could impact your pay account. In our News and Events section, you can find our

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Retiree Newsletter and our Survivor SBP Newsletter. You can also read about Retired and Annuitant Pay, Managing Your Retirement or Your SBP Account, and Providing for Your Loved Ones.

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 3 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.

Quick Tools Webpage and “askDFAS Tips” Video

Please visit our Quick Tools webpage to find all our most-requested tools and resources in one convenient location.

This webpage also includes a link to the “askDFAS Tips” video that provides a guided overview of all the askDFAS online tools detailed in this guide.

Visit today: <https://www.dfas.mil/raqicktools>

Read our Newsletters!

Stay informed by reading our quarterly Retiree Newsletter and our bi-annual Survivor SBP Newsletter! Here you will find important information to keep you up to date with all the changes happening. The newsletters include important seasonal information that will help you prepare when you need to act. We also include all the enhancements we have implemented to assist you with your retired pay or SBP pay account.

myPay: myPay Website (<https://mypay.dfas.mil>)

You can also 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 our pay system.

askDFAS Tools For Retirees

Retiree Tool Overview

Category Name: Retiree - Form Upload Tools

Tool: General Retiree Documents – Upload

(Use this if the document does not fit one of the specific tools below)

Tool: **Active Duty Retirement Ppwk – Upload**

Tool: **DD 2558 – Allotment Updates – Upload**

Tool: **DD 2894 – Desig of Beneficiary – Upload**

Tool: Power of Attorney/3rd Party Doc – Upload

Tool: **Reserve/Guard Retirement Ppwk – Upload**

Tool: Retiree DOHA Appeal – Upload

Tool: **SBP DD 2656-1 – Upload**

Tool: **SBP DD 2656-2 – Upload**

Tool: **SBP DD 2656-6 – Upload**

Tool: **SBP DD 2656-8 – Upload**

Tool: **Tax Withholding Changes – Upload**

**Green denotes Form Upload Tools that will deliver Status Notifications to the email address included on the askDFAS ticket*

Category Name: Retiree – Ask a Question

Tool: Disability Entitlements – Questions

Tool: General / Form / Document – Questions

Tool: General Disability Pay – Questions

Tool: International Direct Deposit – Questions

Tool: Payment Inquiry – Questions

Tool: Survivor Benefit Plan – Questions

Category Name: Self-Service Account Changes

Tool: Mailing Address Update – Retirees

Tool: Request Verification of Pay Letter

Category Name: Report a Death/Survivor - Ask a Question

Tool: Report the Death of a Retiree

Tool: Report Death of an SBP Annuitant

Tool: Final Pay of a Deceased Retiree – Questions

Tool: Starting SBP Annuity Pay – Questions

Retiree Ticket – Form Upload

After navigating to the Ask Retired Pay module page, retirees uploading forms/documents should click the **Submit A Ticket** button, and then select the category “**Retiree – Form Upload Tools.**”

This guide provides step-by-step instructions on how to upload and submit documents to DFAS for processing, using the example of the subcategory called “DD 2894 - Desig of Beneficiary - Upload.”

1. The “Submit A Ticket” button will take you to the Category and Subcategory section. Click on the arrow next to “Retiree - Form Upload Tools.” A list of subcategories will populate. Click on the arrows next to the correct subcategory to open a ticket.

The screenshot displays the 'ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE' web interface. At the top, there are buttons for 'FAQs', 'Submit A Ticket', 'Help', and 'Exit'. Below these, instructions for Step 1 and Step 2 are provided. Step 1 states 'Category selected is: Retiree - Form Upload Tools'. Step 2 instructs to 'Select a Subcategory by clicking the >> button next to the subcategory name.' A note specifies that this category is for Military Retirees to upload documents to DFAS for processing.

The interface is divided into two main sections: 'Categories' and 'Subcategories'. In the 'Categories' list, 'Retiree - Form Upload Tools' is highlighted with a red box. A red arrow points from this category to the 'Subcategories' list, where 'DD 2894 - Desig of Beneficiary - Upload' is also highlighted with a red box. Other categories listed include 'Report a Death / Survivor - Ask a Question', 'Retiree - Ask a Question', 'SBP Annuitant - Ask A Question', 'SBP Annuitant/Survivor - Form Upload Tools', 'Self-Service Account Changes', and 'Used ONLY by BoS/Fed Agency Partners-Form Uploads'. Other subcategories listed include 'Active Duty Retirement Ppwk - Upload', 'DD 2558 - Allotment Updates - Upload', 'General Retiree Documents - Upload', 'Power of Attorney/3rd Party Doc - Upload', 'Reserve/Guard Retirement Ppwk - Upload', 'Retiree DOHA Appeal - Upload', 'SBP DD 2656-1 - Upload', 'SBP DD 2656-2 - Upload', 'SBP DD 2656-6 - Upload', 'SBP DD 2656-8 - Upload', and 'Tax Withholding Changes - Upload'.

2. The example below shows the Category as “Retiree – Form Upload Tools” and the Subcategory is “DD 2894 – Desig of Beneficiary - Upload” marked with the red box.

After verifying the correct Category and Subcategory, begin to complete the form. The required fields to complete the form are:

- First Name
- Last Name
- Email and Re-enter Email
 - This email address is where ticket receipt confirmations will be sent. Status notification emails will also be sent to this email address, when applicable.
- Passcode
 - Complexity requirements for passwords are listed within the ticket.
- Current Phone Number
- Member SSN

The screenshot shows a web form titled "Your Information". At the top, there is a link "Change Category/Sub-Category selection". Below this, the "Category:" is set to "Retiree - Form Upload Tools" and the "Subcategory:" is set to "DD 2894 - Desig of Beneficiary - Upload", both of which are enclosed in a red rectangular box. The form includes several input fields: "Name:" with sub-fields for "First*", "Middle:", and "Last*"; "Email*:" and "Re-enter Email*:"; "Passcode*:" with a text area and instructions: "Create a passcode for this ticket to view information and responses. Passcodes must be a minimum of 15 characters and contain at least one lowercase letter, one uppercase letter, one number, and one special character. Passcodes cannot contain your name or email address. Safeguard your passcode for future use."; "Current Phone Number*:" with an example "123-456-7890 (please include country code if international)"; and "Member SSN*:" with a note "Please enter the Member (Retiree) SSN with no dashes (e.g. 123456789)". A "NOTE" section at the bottom states: "NOTE: Whoever, in any matter within the jurisdiction of any department or agency of the United States, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device, a material fact, or makes any false, fictitious, or fraudulent statements or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious, or fraudulent statement or entry, shall be fined, imprisoned not more than 5 years, or both (U.S. Code, Title 18, Section 1001)."

3. Carefully review the information presented in the “Customer Confirmation” section to ensure that your submission is being directed to the proper place, and that it meets the “Important Requirements to Ensure a Successful Submission.”

PLEASE NOTE:

This online upload tool is for submitting the Designation of Beneficiary (DD 2894) and supporting documentation (if applicable). Do not submit file(s) using this tool without a DD 2894 form.

Ensure that Member information (SSN) is included ON EVERY FILE so DFAS can identify and process the request as promptly as possible. Any cover page or supporting information on your request should be included within the main file and not as a standalone page.

Customer Confirmation*: ****Important Requirements to Ensure a Successful Submission****

- Please submit PDF Files ONLY (The system cannot process PDF Portfolios and will reject them).
- Any non-PDF file is prohibited. Examples include: Word, Excel, Image, or Text Files.
- If needed, please convert your file to PDF ("Save As" PDF or "Print To" PDF) before submitting.
- Ensure the Member's SSN is present on every document (preferably on each page). For requests pertaining SBP Annuitant(s), please make sure the SSN(s) are present for SBP Annuitant(s) as well.
- If your document is multiple pages, please combine them into a single file (i.e. related pages should not be sent as separate files) to ensure proper routing.
- There are 3 upload slots available below. Your main request should be the first file. If you have supporting documents, you may use the additional two upload slots.
- There is a 35 MB file size limit per ticket. If your files exceed this amount, please submit the additional files on a separate ticket.

Please note: Submissions that do not meet the above guidelines may not be received by DFAS and therefore, your request may not be processed. Form upload tools are not monitored, so DFAS will not communicate with you via this ticket except in rare instances to notify you of an issue receiving your requests.

Please allow 3 business days for your document(s) to be available in our system for processing. Most requests can be processed in 30 days if the information is complete. Please see our "How Long Does It Take" webpage for additional information: <https://www.dfas.mil/rahowlong>

Once you ensure your file(s) meet these requirements, please check the box below.
You may then select "Choose File" to upload your document(s). Once all documents are selected, click "Upload File(s)" and then click "Submit."

=====

☐ I confirm that I understand the above requirements and that I am eligible to submit my request using this ticket.

Users must click the "I confirm..." box in order to submit document(s).

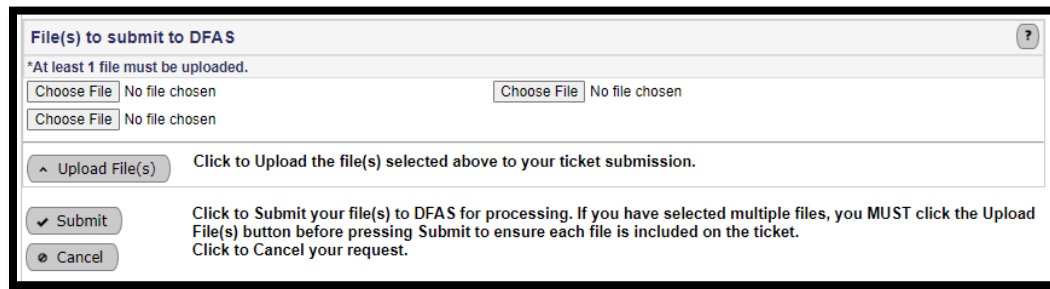
Please allow 3 business days for your document(s) to be available in our system for processing. Most requests can be processed in 30 days if the information is complete. Please see our "How Long Does It Take" webpage for additional information: <https://www.dfas.mil/rahowlong>

Once you ensure your file(s) meet these requirements, please check the box below.
You may then select "Choose File" to upload your document(s). Once all documents are selected, click "Upload File(s)" and then click "Submit."

=====

☐ I confirm that I understand the above requirements and that I am eligible to submit my request using this ticket.

4. Scroll to the bottom and select "Choose File." Select the file(s) you wish to submit to DFAS from the location on your device. It is very important that users click "Upload File(s)" in order to make sure all files are attached to the ticket. Users may upload up to 3 separate files. Please ensure each attachment is only for one individual. If it is multiple pages, that is acceptable, but please add the SSN at least to the first page (preferably to all pages).
5. Lastly, click the "Submit" button to send the file(s) to DFAS.



File(s) to submit to DFAS ?

*At least 1 file must be uploaded.

Choose File No file chosen Choose File No file chosen

Choose File No file chosen

^ Upload File(s) Click to Upload the file(s) selected above to your ticket submission.

✓ Submit Click to Submit your file(s) to DFAS for processing. If you have selected multiple files, you MUST click the Upload File(s) button before pressing Submit to ensure each file is included on the ticket. Click to Cancel your request.

✕ Cancel

Retiree Ticket – Ask A Question

Users may ask a question using the appropriate category and subcategory.

It is important to note that the ticket for questions will vary based on the expected level of detail needed for DFAS to respond.

Some tickets are general, and do not anticipate account-specific details in the response.

Other tickets are designed for account-specific questions and will ask “Validation Questions” that you must answer correctly in order for DFAS to respond. On such tickets, if the Validation Questions are answered incorrectly, a 24-hour security hold will be placed on the user’s account. This means that the user must wait until the 24-hour security hold is over to contact the DFAS Cleveland Customer Care Center for more assistance. Visit our Customer Service webpage at www.dfas.mil/raservice to get the DFAS Cleveland Customer Care Center information.

Each ticket will explain whether it is for general or account-specific questions. If a user chooses a subcategory set up for general questions, yet asks an account-specific question, the DFAS Cleveland Customer Care Center will respond on the ticket asking the validation questions required to provide the response.

Following are two examples of “Ask A Question” tickets. The first shows an example of a ticket that anticipates a general question (no “Validation Questions” section), while the second is one set up for account-specific questions.

Example of Ticket for General Question:

Your Information	
Category:	Change Category/Sub-Category selection Retiree - Ask a Question
Subcategory:	General / Form / Document - Questions
Name:	First*: <input type="text"/> Middle: <input type="text"/> Last*: <input type="text"/>
To ensure spam blocker does not block receipt of responses regarding your ticket, please add dfas.cleveland-oh.zte.mbx.web-askdfas@mail.mil to your safe senders email list before submitting your ticket.	
	Email*: <input type="text"/> Re-enter Email*: <input type="text"/>
Passcode*:	Create a passcode for this ticket to view information and responses. Passcodes must be a minimum of 15 characters and contain at least one lowercase letter, one uppercase letter, one number, and one special character. Passcodes cannot contain your name or email address. Safeguard your passcode for future use. <input type="text"/>
Retiree SSN*:	<input type="text"/>
Current Phone Number*:	Example: 123-456-7890 (please include country code if international) <input type="text"/>
<p>NOTE: Whoever, in any matter within the jurisdiction of any department or agency of the United States, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device, a material fact, or makes any false, fictitious, or fraudulent statements or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious, or fraudulent statement or entry, shall be fined, imprisoned not more than 5 years, or both (U.S. Code, Title 18, Section 1001).</p> <p>=====</p> <p>This subcategory is for GENERAL questions (requiring no account-specific details), and for information about obtaining or filling out a form to manage your pay. Account-specific questions should be redirected to the "Payment Inquiry - Questions" subcategory.</p> <p>Your question will be answered by the DFAS Cleveland Customer Care Center. If you need to upload forms/documents to DFAS, you must navigate to the appropriate "Form Upload Tool" category in askDFAS.</p> <p>Depending on the nature of your request, we may have to ask you additional validation questions. DFAS will include any such requests for additional information on a reply to this ticket.</p> <p>=====</p>	
Question*:	<div><input type="text"/></div>
<input checked="" type="radio"/> Submit	Click to Submit your question to the DFAS Cleveland Customer Care Center. We will provide an initial response within 3 business days. Please remember the passcode you created on this ticket so that you can access it to review the answer. You will receive an email when an answer is available on the ticket.
<input type="radio"/> Cancel	Click to Cancel your request.

Example of Ticket for Account-Specific Question:

Your Information	
Category:	Change Category/Sub-Category selection Retiree - Ask a Question
Subcategory:	Payment Inquiry - Questions
Name:	First*: <input type="text"/> Middle*: <input type="text"/> Last*: <input type="text"/>
To ensure spam blocker does not block receipt of responses regarding your ticket, please add dfas.cleveland-oh.zte.mbx.web-askdfas@mail.mil to your safe senders email list before submitting your ticket.	
	Email*: <input type="text"/> Re-enter Email*: <input type="text"/>
Passcode*:	Create a passcode for this ticket to view information and responses. Passcodes must be a minimum of 15 characters and contain at least one lowercase letter, one uppercase letter, one number, and one special character. Passcodes cannot contain your name or email address. Safeguard your passcode for future use. <input type="text"/>
Retiree SSN*:	<input type="text"/>
Current Phone Number*:	Example: 123-456-7890 (please include country code if international) <input type="text"/>
<p>NOTE: Whoever, in any matter within the jurisdiction of any department or agency of the United States, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device, a material fact, or makes any false, fictitious, or fraudulent statements or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious, or fraudulent statement or entry, shall be fined, imprisoned not more than 5 years, or both (U.S. Code, Title 18, Section 1001).</p> <p>=====</p> <p>This subcategory is for account-specific questions related to your military retired pay.</p> <p>The box below is intended for QUESTIONS only. Your question will be answered by the DFAS Cleveland Customer Care Center. If you need to upload forms/documents to DFAS, you must navigate to the appropriate "Form Upload Tool" category in askDFAS.</p> <p>In order for DFAS to respond to your request with any account-specific information, you MUST correctly answer the validation questions below. Please monitor your email for changes to this ticket.</p> <p>Depending on the nature of your request, we may have to ask you additional validation questions. DFAS will include any such requests for additional information on a reply to this ticket.</p> <p>Otherwise, if the validation questions are answered correctly, we will provide the required information in our response.</p> <p>If we are unable to verify your information, account specific details will not be released, and a 24-hour security hold will be placed on the account.</p> <p>If a 24-hour security hold is placed on your account, you will need to contact the DFAS Customer Care Center for additional assistance AFTER the 24-hour security hold.</p> <p>=====</p> <p>Validation Questions:</p> <p>Years of Service*: How many years of service do you have? (For example, for 24 years of service, enter "24") <input type="text"/></p> <p>Your Branch of Service*: Which Branch of Service did you retire from? <input type="text"/></p> <p>Rank/Grade at Retirement*: What was your Rank or Pay Grade at retirement? <input type="text"/></p> <p>Monthly State Income Tax Withholding*: Enter the dollar amount of State income tax withheld from your monthly pay. If none, enter "n/a." <input type="text"/></p> <p>State Designated for Withholding*: Please select the State designated for your monthly income tax withholding. If none, select "n/a." <input type="text"/></p> <p>=====</p> <p>Please type your question below and monitor your email address for a notification that this ticket has been updated.</p> <p>Account-specific questions can only be answered on this ticket if you correctly answered the above validation questions.</p> <p>If you are not able to correctly answer the validation questions, please contact the DFAS Customer Care Center AFTER the 24-hour security hold period ends.</p> <p>=====</p> <p>Question*: <input type="text"/></p> <p><input type="button" value="Submit"/> <input type="button" value="Cancel"/></p> <p>Click to Submit your question to the DFAS Cleveland Customer Care Center. We will provide an initial response within 3 business days. Please remember the passcode you created on this ticket so that you can access it to review the answer. You will receive an email when an answer is available on the ticket. Click to Cancel your request.</p>	

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askDFAS Tools For SBP Annuitants

SBP Annuitant Tool Overview

Category Name: SBP Annuitant/Survivor - Form Upload Tools

Tool: General SBP Annuitant Documents – Upload

(Use this if the document does not fit one of the specific tools below)

Tool: **DD 2656-7 – Claim SBP Annuity – Upload**

Tool: **DD 2788 – Child Ann School Cert -Upload**

Tool: **DD 2828 – Child Ann Phys Cert – Upload**

Tool: **DFAS 9415 – Ann Rep Payee Cert – Upload**

Tool: Power of Attorney/3rd Party Doc – Upload

Tool: SBP Annuitant DOHA Appeal – Upload

Tool: **SBP-Marital Status Update – Upload**

Tool: **SF 1174 – Arrears of Pay (AOP) – Upload**

Tool: **Tax Withholding Changes – Upload**

**Green denotes Form Upload Tools that will deliver Status Notifications to the email address included on the askDFAS ticket*

Category Name: SBP Annuitant - Ask a Question

Tool: Annual Eligibility/School Cert-Questions

Tool: General / Form / Document – Questions

Tool: Payment Inquiry – Questions

Tool: Starting SBP Annuity Pay – Questions

Category Name: Self-Service Account Changes

Tool: Mailing Address Update – SBP Annuitants

Tool: Request Verification of Pay Letter

Category Name: Report a Death/Survivor - Ask a Question

Tool: Report the Death of a Retiree

Tool: Report Death of an SBP Annuitant

Tool: Final Pay of a Deceased Retiree – Questions

Tool: Starting SBP Annuity Pay – Questions

SBP Annuitant Ticket – Form Upload

After navigating to the Ask Retired Pay module page, SBP annuitants uploading forms/documents should click the **Submit A Ticket** button, and then select the category **“SBP Annuitant/Survivor – Form Upload Tools.”**

This guide provides step-by-step instructions on how to upload and submit documents to DFAS for processing, using the example of the subcategory called **“DD 2788 – Child Ann School Cert – Upload.”**

1. The “Submit A Ticket” button will take you to the Category and Subcategory section. Click on the arrow next to “SBP Annuitant/Survivor – Form Upload Tools.” A list of subcategories will populate. Click on the arrows next to the correct subcategory to open a ticket.

ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE

FAQs **Submit A Ticket** Help Exit

✓ Step 1: Category selected is: SBP Annuitant/Survivor - Form Upload Tools
Step 2: Select a Subcategory by clicking the >> button next to the subcategory name.

This online upload tool is for submitting the Child Annuitant's School Certificate (DD 2788) form and supporting documentation (if applicable).

Categories	Subcategories
>> Report a Death / Survivor - Ask a Question	>> DD 2656-7 - Claim SBP Annuity - Upload
>> Retiree - Ask a Question	>> DD 2788 - Child Ann School Cert - Upload
>> Retiree - Form Upload Tools	>> DD 2828 - Child Ann Phys Cert - Upload
>> SBP Annuitant - Ask A Question	>> DFAS 9415 - Ann Rep Payee Cert - Upload
>> SBP Annuitant/Survivor - Form Upload Tools	>> General SBP Annuitant Documents - Upload
>> Self-Service Account Changes	>> Power of Attorney/3rd Party Doc - Upload
>> Used ONLY by BoS/Fed Agency Partners-Form Uploads	>> SBP Annuitant DOHA Appeal - Upload
	>> SBP-Marital Status Update - Upload
	>> SF 1174 - Arrears of Pay (AOP) - Upload
	>> Tax Withholding Changes - Upload

2. The example below shows the Category as “SBP Annuitant/Survivor – Form Upload Tools” and the Subcategory is “DD 2788 Child Ann School Cert - Upload” marked with the red box.

Your Information

[Change Category/Sub-Category selection](#)

Category: SBP Annuitant/Survivor - Form Upload Tools
Subcategory: DD 2788 - Child Ann School Cert -Upload

Name: First*: Middle*: Last*:
[Text Box] [Text Box] [Text Box]

To ensure spam blocker does not block receipt of responses regarding your ticket, please add dfas.cleveland-oh.zte.mbx.web-askdfas@mail.mil to your safe senders email list before submitting your ticket.

Email*: Re-enter Email*:
[Text Box] [Text Box]

Passcode*: Create a passcode for this ticket to view information and responses. Passcodes must be a minimum of 15 characters and contain at least one lowercase letter, one uppercase letter, one number, and one special character. Passcodes cannot contain your name or email address. Safeguard your passcode for future use.
[Text Box]

NOTE: Whoever, in any matter within the jurisdiction of any department or agency of the United States, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device, a material fact, or makes any false, fictitious, or fraudulent statements or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious, or fraudulent statement or entry, shall be fined, imprisoned not more than 5 years, or both (U.S. Code, Title 18, Section 1001).

Current Phone Number*: [Text Box]
Example: 123-456-7890 (please include country code if international)

Member SSN*: [Text Box]
Please enter the Member (Retiree) SSN with no dashes (e.g. 123456789)

SBP Annuitant SSN*: [Text Box]
Please enter the your (the SBP Annuitant) SSN with no dashes (e.g. 987654321)

After verifying the correct Category and Subcategory, begin to complete the form. The required fields to complete the form are:

- First Name
 - Last Name
 - Email and Re-enter Email
 - This email address is where ticket receipt confirmations will be sent. Status notification emails will also be sent to this email address, when applicable.
 - Passcode
 - Complexity requirements for passwords are listed within the ticket.
 - Current Phone Number
 - Member SSN
 - SBP Annuitant SSN
3. Carefully review the information presented in the “Customer Confirmation” section to ensure that your submission is being directed to the proper place, and that it meets the “Important Requirements to Ensure a Successful Submission.”

PLEASE NOTE:

This online upload tool is for submitting the Child Annuitant's School Certificate (DD 2788) form and supporting documentation (if applicable).

Ensure that your SBP Annuitant SSN, along with the Member SSN, is included ON ANY FILE so DFAS can identify and process the request as promptly as possible. Any cover page or supporting information on your request should be included within the main file and not as a standalone page.

Customer Confirmation*: ****Important Requirements to Ensure a Successful Submission****

- Please submit PDF Files ONLY (The system cannot process PDF Portfolios and will reject them).
- Any non-PDF file is prohibited. Examples include: Word, Excel, Image, or Text Files.
- If needed, please convert your file to PDF ("Save As" PDF or "Print To" PDF) before submitting.
- Ensure the Member's SSN is present on every document (preferably on each page). For requests pertaining SBP Annuitant(s), please make sure the SSN(s) are present for SBP Annuitant(s) as well.
- If your document is multiple pages, please combine them into a single file (i.e. related pages should not be sent as separate files) to ensure proper routing.
- There are 3 upload slots available below. Your main request should be the first file. If you have supporting documents, you may use the additional two upload slots.
- There is a 35 MB file size limit per ticket. If your files exceed this amount, please submit the additional files on a separate ticket.

Please note: Submissions that do not meet the above guidelines may not be received by DFAS and therefore, your request may not be processed. Form upload tools are not monitored, so DFAS will not communicate with you via this ticket except in rare instances to notify you of an issue receiving your requests.

Please allow 3 business days for your document(s) to be available in our system for processing. Most requests can be processed in 30 days if the information is complete. Please see our "How Long Does It Take" webpage for additional information: <https://www.dfas.mil/rahowlong>

Once you ensure your file(s) meet these requirements, please check the box below.
You may then select "Choose File" to upload your document(s). Once all documents are selected, click "Upload File(s)" and then click "Submit."

=====

☐ I confirm that I understand the above requirements and that I am eligible to submit my request using this ticket.

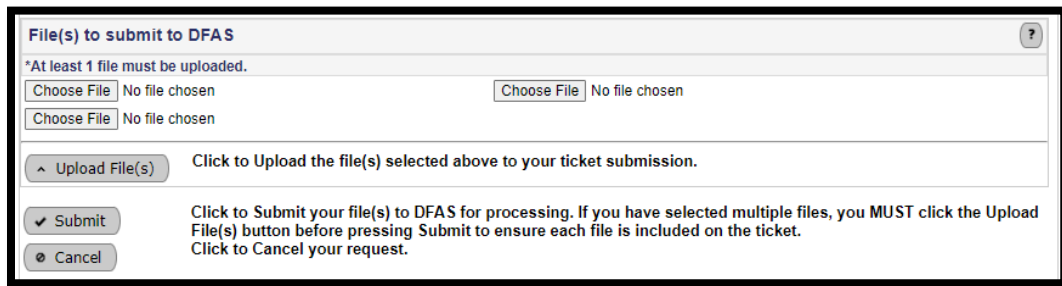
Users must click the "I confirm..." box in order to submit document(s).

Once you ensure your file(s) meet these requirements, please check the box below.
You may then select "Choose File" to upload your document(s). Once all documents are selected, click "Upload File(s)" and then click "Submit."

=====

☐ I confirm that I understand the above requirements and that I am eligible to submit my request using this ticket.

4. Scroll to the bottom and select "Choose File." Select the file(s) you wish to submit to DFAS from the location on your device. It is very important that users click "^ Upload File(s)" to make sure all files are attached to the ticket. Users may upload up to 3 separate files. Please ensure each attachment is only for one individual. If it is multiple pages, that is acceptable, but please add the SSN at least to the first page, preferably to all pages. The military retiree and the SBP annuitant SSNs should both be included.
5. Lastly, click the "Submit" button to send the file(s) to DFAS.



SBP Annuitant Ticket – Ask A Question

Users may ask a question using the appropriate category and subcategory.

It is important to note that the ticket information for questions will vary based on the expected level of detail needed for DFAS to respond.

Some tickets are general, and do not anticipate account-specific details in the response.

Other tickets are designed for account-specific questions and will ask “Validation Questions” that you must answer correctly in order for DFAS to respond. On such tickets, if the Validation Questions are answered incorrectly, a 24-hour security hold will be placed on the user’s account. This means that the user must wait until the 24-hour security hold is over to contact the DFAS Cleveland Customer Care Center for more assistance. Visit our Customer Service webpage at www.dfas.mil/raservice to get the DFAS Cleveland Customer Care Center information.

Each ticket will explain whether it is for general or account-specific questions. If a user chooses a subcategory set up for general questions, yet asks an account-specific question, the DFAS Cleveland Customer Care Center will reply on the ticket asking the validation questions required to provide the response.

What follows are two examples of “Ask A Question” tickets. The first shows an example of a ticket that anticipates a general question (no “Validation Questions” section), while the second is one set up for account-specific questions.

Example of Ticket for General Question:

Your Information	
Category:	Change Category/Sub-Category selection SBP Annuitant - Ask A Question
Subcategory:	General / Form / Document - Questions
Name:	First*: <input type="text"/> Middle*: <input type="text"/> Last*: <input type="text"/>
	To ensure spam blocker does not block receipt of responses regarding your ticket, please add dfas.cleveland-oh.zte.mbx.web-askdfas@mail.mil to your safe senders email list before submitting your ticket.
	Email*: <input type="text"/> Re-enter Email*: <input type="text"/>
Passcode*:	Create a passcode for this ticket to view information and responses. Passcodes must be a minimum of 15 characters and contain at least one lowercase letter, one uppercase letter, one number, and one special character. Passcodes cannot contain your name or email address. Safeguard your passcode for future use. <input type="text"/>
SBP Annuitant SSN*:	Please enter the SBP Annuitant SSN with no dashes (e.g. 999999999) <input type="text"/>
Current Phone Number*:	Example: 123-456-7890 (please include country code if international) <input type="text"/>
	<p>NOTE: Whoever, in any matter within the jurisdiction of any department or agency of the United States, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device, a material fact, or makes any false, fictitious, or fraudulent statements or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious, or fraudulent statement or entry, shall be fined, imprisoned not more than 5 years, or both (U.S. Code, Title 18, Section 1001).</p> <p>=====</p> <p>This subcategory is for GENERAL questions (requiring no account-specific details), and for information about obtaining or filling out a form to manage your pay. Account-specific questions should be redirected to the "Payment Inquiry - Questions" subcategory.</p> <p>Your question will be answered by the DFAS Cleveland Customer Care Center. If you need to upload forms/documents to DFAS, you must navigate to the appropriate "Form Upload Tool" category in askDFAS.</p> <p>Depending on the nature of your request, we may have to ask you additional validation questions. DFAS will include any such requests for additional information on a reply to this ticket.</p> <p>=====</p>
Question*:	<input type="text"/>
<input checked="" type="button" value="Submit"/>	Click to Submit your question to the DFAS Cleveland Customer Care Center. We will provide an initial response within 3 business days. Please remember the passcode you created on this ticket so that you can access it to review the answer. You will receive an email when an answer is available on the ticket.
<input type="button" value="Cancel"/>	Click to Cancel your request.

Example of Ticket for Account-Specific Question:

Your Information	
Category:	Change Category/Sub-Category selection SBP Annuitant - Ask A Question
Subcategory:	Payment Inquiry - Questions
Name:	First*: <input type="text"/> Middle*: <input type="text"/> Last*: <input type="text"/>
To ensure spam blocker does not block receipt of responses regarding your ticket, please add dfas.cleveland-oh.zte.mbx.web-askdfas@mail.mil to your safe senders email list before submitting your ticket.	
Email*:	<input type="text"/>
Re-enter Email*:	<input type="text"/>
Passcode*:	Create a passcode for this ticket to view information and responses. Passcodes must be a minimum of 15 characters and contain at least one lowercase letter, one uppercase letter, one number, and one special character. Passcodes cannot contain your name or email address. Safeguard your passcode for future use. <input type="text"/>
SBP Annuitant SSN*:	Please enter the SBP Annuitant SSN with no dashes (e.g. 999999999) <input type="text"/>
Current Phone Number*:	Example: 123-456-7890 (please include country code if international) <input type="text"/>
<p>NOTE: Whoever, in any matter within the jurisdiction of any department or agency of the United States, knowingly and willfully falsifies, conceals, or covers up by any trick, scheme, or device, a material fact, or makes any false, fictitious, or fraudulent statements or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious, or fraudulent statement or entry, shall be fined, imprisoned not more than 5 years, or both (U.S. Code, Title 18, Section 1001).</p> <p>=====</p> <p>This subcategory is for account-specific questions related to your Survivor Benefit Plan annuity pay.</p> <p>Your question will be answered by the DFAS Cleveland Customer Care Center. If you need to upload forms/documents to DFAS, you must navigate to the appropriate "Form Upload Tool" category in askDFAS.</p> <p>In order for DFAS to respond to your request with any account-specific information, you MUST correctly answer the validation questions below. Please monitor your email for changes to this ticket.</p> <p>Depending on the nature of your request, we may have to ask you additional validation questions. DFAS will include any such requests for additional information on a reply to this ticket.</p> <p>Otherwise, if the validation questions are answered correctly, we will provide the required information in our response.</p> <p>If we are unable to verify your information, account specific details will not be released, and a 24-hour security hold will be placed on the account.</p> <p>If a 24-hour security hold is placed on your account, you will need to contact the DFAS Customer Care Center for additional assistance AFTER the 24-hour security hold.</p> <p>=====</p> <p>Validation Questions:</p> <p>SBP Annuitant Date of Birth*: <input type="text"/></p> <p>SBP Annuitant Current Mailing Address*: Please enter the complete mailing address currently on file for this SBP Annuity account. Foreign addresses should also include foreign country information in the address listed. <input type="text"/></p> <p>Retiree's Date of Death*: Please enter the date of death for the military retiree who passed away. <input type="text"/></p> <p>Retiree's Branch of Service*: <input type="text"/></p> <p>=====</p> <p>Please type your question below and monitor your email address for a notification that this ticket has been updated.</p> <p>Account-specific questions can only be answered on this ticket if you correctly answered the above validation questions.</p> <p>If you are not able to correctly answer the validation questions, please contact the DFAS Customer Care Center AFTER the 24-hour security hold period ends.</p> <p>=====</p> <p>Question*: <input type="text"/></p> <p><input type="button" value="Submit"/> <input type="button" value="Cancel"/></p> <p>Click to Submit your question to the DFAS Cleveland Customer Care Center. We will provide an initial response within 3 business days. Please remember the passcode you created on this ticket so that you can access it to review the answer. You will receive an email when an answer is available on the ticket.</p> <p>Click to Cancel your request.</p>	

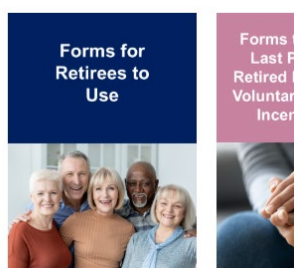
Form Wizard Demonstration + “One Click” askDFAS Upload

Below is an example of how to use our Form Wizards to complete eligible forms. Some Form Wizards (like the DD 2894 example below) can be digitally signed and/or submitted via askDFAS using a “One Click” function for a seamless end-to-end customer experience.

1. Navigate to the Forms Library: <https://www.dfas.mil/raforms>
2. Users may scroll down the page to locate the **Beneficiary for Last Retired Pay Payment (Arrears of Pay – AOP) – Designate or Update** section on the Forms Library webpage.

For a more seamless experience, simply click the helpful card. First, click the “**Forms for Retirees to Use**” card:

Get Started. I Need...



Next, click the “**Beneficiary for Last Retired Pay Payment (Arrears of Pay – AOP) – Designate or Update**” card:



Finally, click on the “**Use our helpful DD Form 2894 Designation of Beneficiary Information Form Wizard**” link in blue:

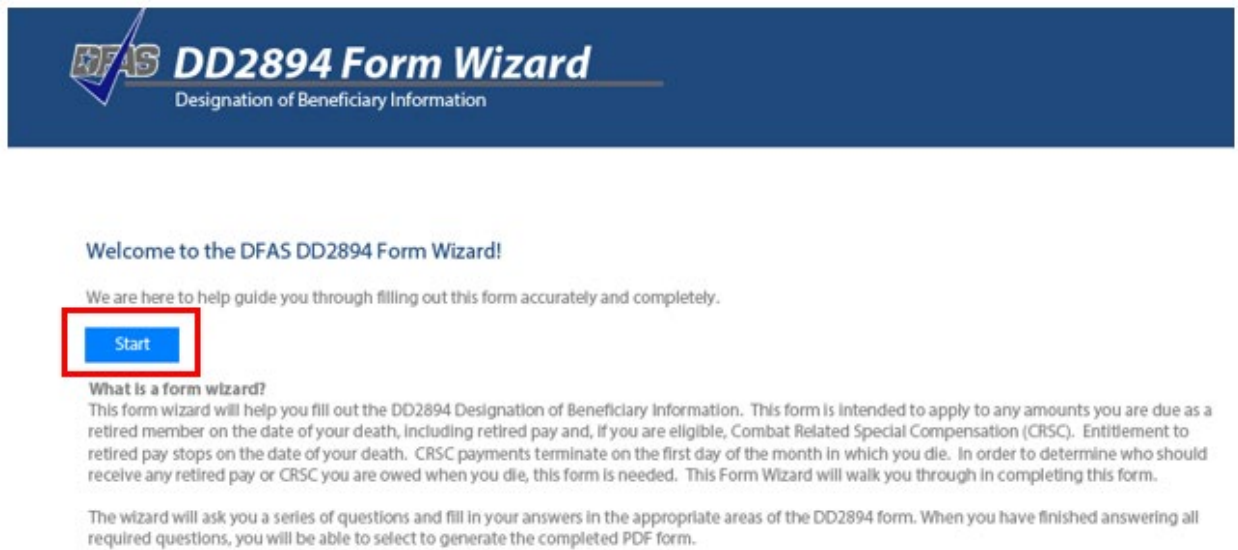
Beneficiary for Last Retired Pay Payment (Arrears of Pay - AOP) - Designate or Update

Options:

- Use myPay (<https://mypay.dfas.mil>) to designate or update your AOP beneficiary.
- Use our helpful [DD Form 2894 Designation of Beneficiary Information Form Wizard](#).
- Use the printable [DD Form 2894 Designation of Beneficiary Information](#).



3. Open the file in Adobe Acrobat and click on the blue **Start** button to begin completing the form.



DFAS DD2894 Form Wizard
Designation of Beneficiary Information

Welcome to the DFAS DD2894 Form Wizard!

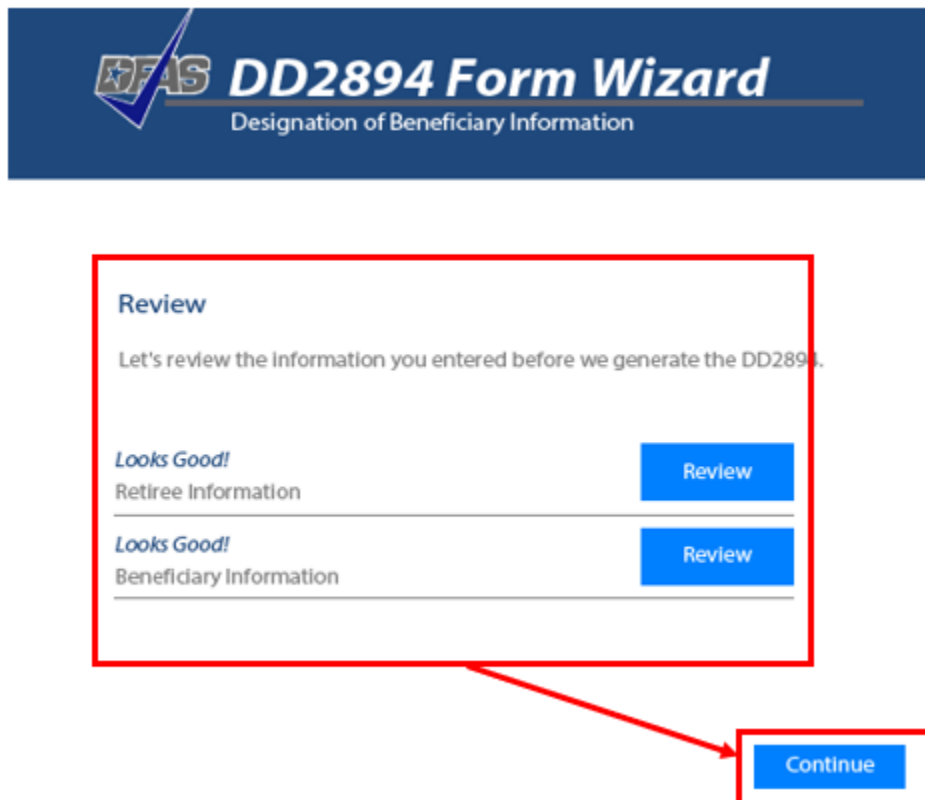
We are here to help guide you through filling out this form accurately and completely.

Start

What is a form wizard?
This form wizard will help you fill out the DD2894 Designation of Beneficiary Information. This form is intended to apply to any amounts you are due as a retired member on the date of your death, including retired pay and, if you are eligible, Combat Related Special Compensation (CRSC). Entitlement to retired pay stops on the date of your death. CRSC payments terminate on the first day of the month in which you die. In order to determine who should receive any retired pay or CRSC you are owed when you die, this form is needed. This Form Wizard will walk you through in completing this form.

The wizard will ask you a series of questions and fill in your answers in the appropriate areas of the DD2894 form. When you have finished answering all required questions, you will be able to select to generate the completed PDF form.

4. Once the Form Wizard is complete, the **Review** section will confirm if all required fields are filled in. If there are no corrections needed, the customer may click "Continue."



DFAS DD2894 Form Wizard
Designation of Beneficiary Information

Review

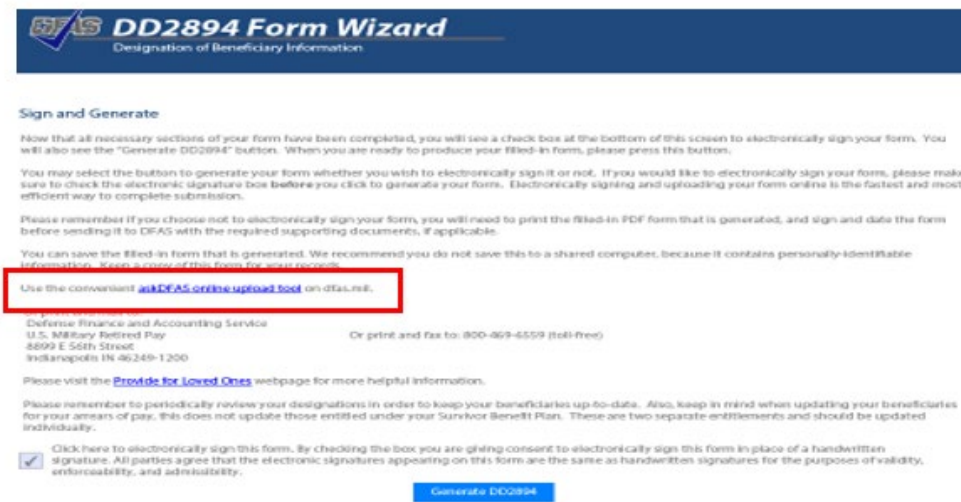
Let's review the information you entered before we generate the DD2894.

Looks Good!
Retiree Information **Review**

Looks Good!
Beneficiary Information **Review**

Continue

5. The DD 2894 form can be **digitally signed** and submitted via the customer-facing askDFAS online form upload tool using the **“One Click” askDFAS link** provided in the Form Wizard. Please reference earlier sections of this guide on how to upload a form using askDFAS.



askDFAS DD2894 Form Wizard
Designation of Beneficiary Information

Sign and Generate

Now that all necessary sections of your form have been completed, you will see a check box at the bottom of this screen to electronically sign your form. You will also see the "Generate DD2894" button. When you are ready to produce your filled-in form, please press this button.

You may select the button to generate your form whether you wish to electronically sign it or not. If you would like to electronically sign your form, please make sure to check the electronic signature box **before** you click to generate your form. Electronically signing and uploading your form online is the fastest and most efficient way to complete submission.

Please remember if you choose not to electronically sign your form, you will need to print the filled-in PDF form that is generated, and sign and date the form before sending it to DFAS with the required supporting documents, if applicable.

You can save the filled-in form that is generated. We recommend you do not save this to a shared computer, because it contains personally identifiable information. [View a copy of this form for your records.](#)

Use the convenient [askDFAS online upload tool](#) on dfas.mil.

Defense Finance and Accounting Service
U.S. Military Retired Pay
4699 E 56th Street
Indianapolis IN 46249-1200

Or print and fax to: 800-469-6559 (toll-free)

Please visit the [Provide for Loved Ones](#) webpage for more helpful information.

Please remember to periodically review your designations in order to keep your beneficiaries up-to-date. Also, keep in mind when updating your beneficiaries for your means of pay, this does not update those entitled under your Survivor Benefit Plan. These are two separate entitlements and should be updated individually.

☒ Click here to electronically sign this form. By checking the box you are giving consent to electronically sign this form in place of a handwritten signature. All parties agree that the electronic signatures appearing on this form are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

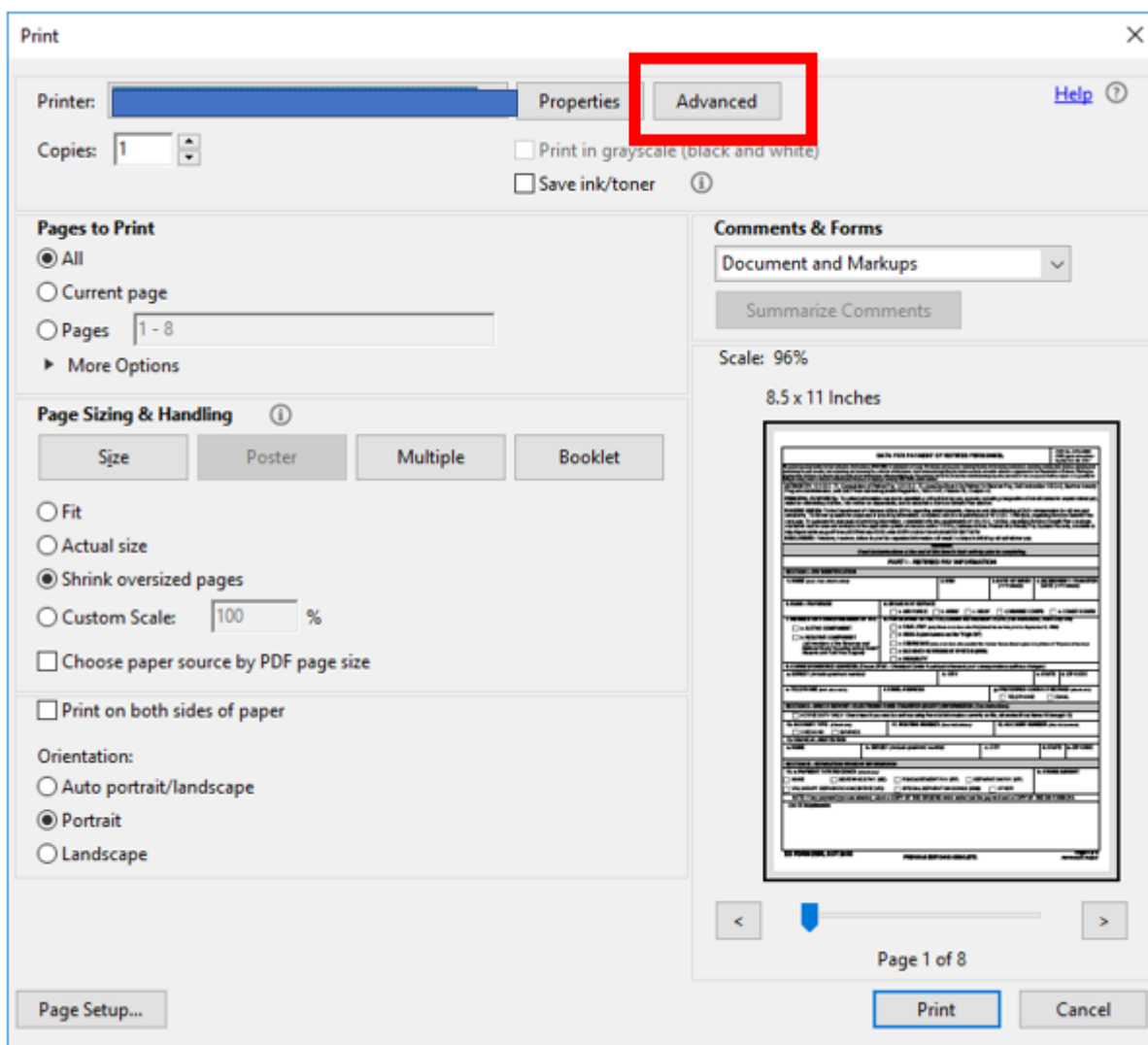
[Generate DD2894](#)

Explainer: Saving Active Forms Into a Static PDF

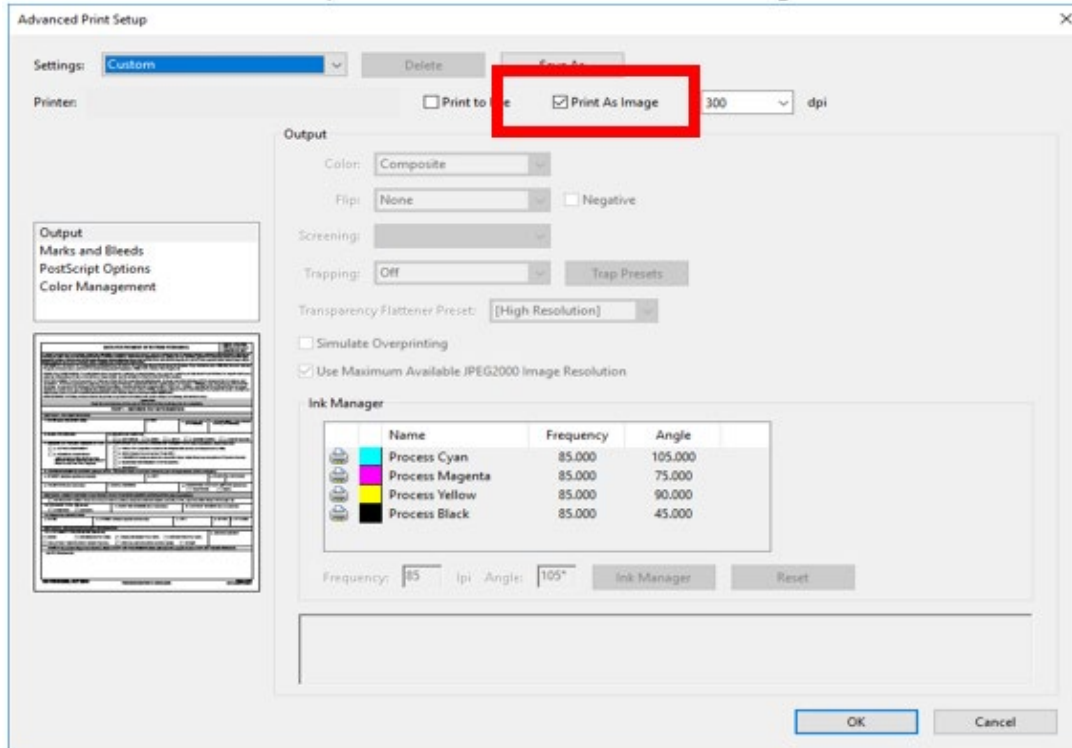
Certain PDF files contain enhanced capabilities that allow users to fill in the form by typing directly into the fields, or logic-driven guidance that makes certain sections “gray out” when deemed not applicable due to prior responses on the form. With such files, it is best to make the PDF static before submitting in askDFAS. Forms with active features may become delayed in reaching the DFAS processing system.

Here’s how to save an active PDF form using Adobe PDF printing:

1. Click on File in the top left corner of the document. When the dropdown appears, click on the Print option. The dropdown option will be available if Adobe PDF is installed as a printer.
2. The Print window will appear. Click on Advanced next to the Printer name at the top of the window.



3. In the Advanced Print Setup, check the box next to “Print As Image” and click OK.



4. For Printer, select Adobe PDF and click Print. Save to a folder on your computer.

