

R&A Quarterly Newsletter



March, Issue 13

Information you can use to help retirees and annuitants!

Director's Message

Hello Everyone –

This issue we're shaking things up a little bit. Instead of a director's message, you're getting an editor's message. I have taken over this column (on a one time only basis) to do two things.

First, I am writing to say good bye and it's been great working with you to our outgoing director, Mr. Thomas McKenna. I know everyone in the field who met him will miss Mr. McKenna's warm and open leadership style, his unique brand of humor, and above all his strong commitment to customer service. Tom, we are all looking forward to working with you in your new role!

Second, I am writing to say welcome aboard to our new director, Mr. Jeff Presley. Everyone in Retired and Annuitant Pay is looking forward to Jeff's leadership to help us achieve more of the outstanding success we have had under Mr. McKenna, and to help move towards our future.

We hope all our partners in the field will join with us in welcoming Jeff.

Sincerely,

Tameka Smith
Editor,
Retired and Annuitant Pay RSO
Newsletter

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Important!

Except where otherwise noted, the articles in this newsletter are written for Retirement Services Officers and are not intended to be published or forwarded.

If you're working on a newsletter or other articles for release to military retirees, please contact Lou Burton, Public Affairs Specialist at 216-204-7089, for more information.

Important Dates:

RSO Call:

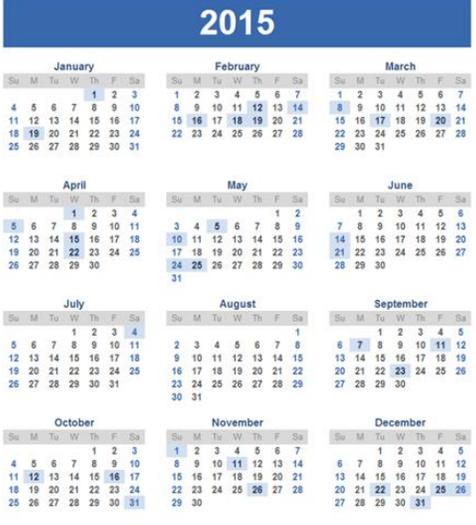
April 28, 2015
Eastern Standard Time 1:30-2:30 p.m.

RSO Newsletter:

May 29, 2015

2015 PayPERS Conference:

July 28-29, 2015



New! Service Liaison Email Address

On February 6, 2015, Retired Pay employees went through the DoD enterprise email (DEE) migration. All the email addresses in Retired and Annuitant Pay changed. Please make a note of the new email address for the Service Liaison Mailbox:

dfas.cleveland-oh.jfb.mbx.service-liaison@mail.mil

Once you submit an item through the service liaison mailbox, you will receive an acknowledgement within three business days that will provide you with status and expected completion date of your item. If you do not receive a response within three business days, please call the External Communications Manager, Lisa Cervantes, at 216-204-7132. The response will acknowledge that your request is being processed, but depending on the nature of your request it can take up to 30 days or more before the request is complete.

Keep in mind that the service liaison box is intended for urgent or escalated cases requiring immediate attention. Each request is reviewed to determine its urgency level, and depending on the urgency it may be forwarded to another department to process along with general requests. We give priority to cases that are pay impactful. Priority cases are handled within 5-10 business days.

The service liaison address is for the sole use of Retiree Service Offices, Retiree Assistance Offices, and Casualty Assistance Offices and should not be shared with members, annuitants, or dependents. Your feedback is important to us because it helps us improve our service to you and the member, so if something is not working, let us know.

Remember all non-pay, impactful transactions should be faxed or mailed to:

Defense Finance and Accounting Service
U.S. Military Retired Pay
P.O. Box 7130
London, KY 40742-7130
Fax: 800-469-6559

RAD Support:

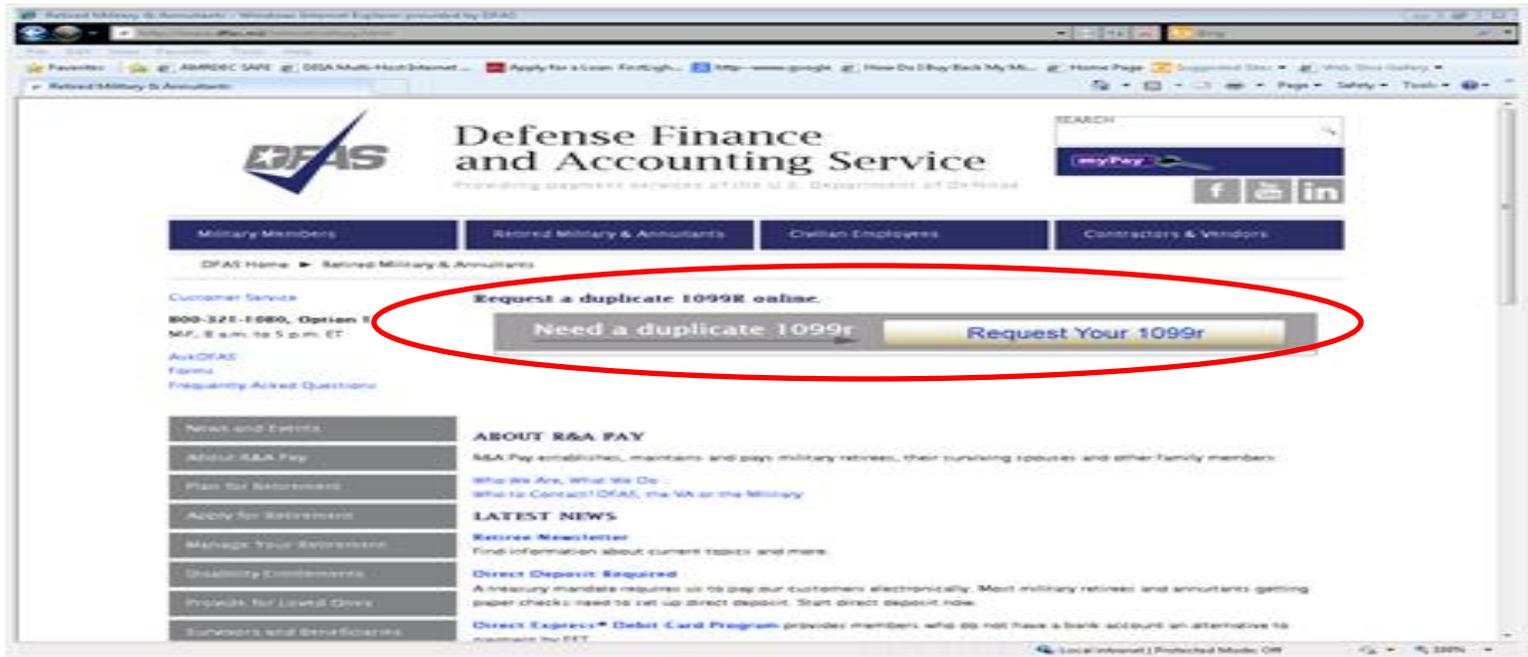
Due to ongoing budget constraints, our funds for travel are limited for fiscal year 2015. If your organization is willing to pay travel expenses for DFAS employees, we can arrange to have a representative from DFAS-Cleveland to attend your Retiree Appreciation Day (RAD)-type events. However, we continue to remain committed to supporting your outings and initiatives in any way we can with our available resources to your representatives in the field. We are still looking for innovative ways to deliver our message at your events and would like your input on any ways we can further facilitate and broaden this endeavor. We also have a wide variety of instructional literature on a host of R&A topics and subject matter that can be sent to support your events. We ask that you please give at least 30 days advance notice of any materials you would like us to provide you, or to get a more detailed description of what topics our materials address. Please send your requests via e-mail to:

dfas.cleveland-oh.jfb.mbx.service-liaison@mail.mil

New! Request Duplicate 1099R Feature

We have a new feature on the Retired Pay homepage at <http://www.dfas.mil/retiredmilitary.html>! This feature provides a way for your members to request a duplicate 1099R. It is particularly useful for members who do not use **myPay**, but who need a 1099R sent right away to an updated mailing address.

Retirees and annuitants can access this feature by simply clicking the “Request your 1099r” button.



Once they have followed the link, members will need to provide the following information:

- Name
- Email address
- Passcode- the passcode is used gain future access to your ticket. In order to view your ticket's information, including the response from our representatives, you will need this passcode. This passcode is unique to you and your ticket. Use something that is easy to remember or write down your code and keep it in a safe location. Passcodes can be 4 - 40 characters long and can contain any number of letters, numbers and/or special characters, but cannot contain your email address or name.
- Social Security Number
- Date of Birth of the retiree
- Branch of Service
- Date of retirement
- Pay Grade at retirement
- If annuitant date of marriage
- If annuitant date of birth

Members can have their 1099R reissued to their address we have on file, by checking “Yes” in the “send to address on file” field. Members also have the option of using the one-time only, temporary address method to receive their 1099R by filling out the “street address line” fields.

Please Note: the temporary address method is a one-time only option for members to have their 1099R reissued, and will not update their permanent address in our records. If members want to permanently update their address on file, they must follow the instructions provided in the conformation email.

Additional Ways to Access 1099R

Military retirees and annuitants receive a 1099R tax statement either electronically via **myPay** or as a paper copy in the mail each year. Members can also request additional copies of their 1099R tax statements in several different ways.

The fastest and most secure way to obtain a copy of the 1099R is **myPay**.

Just login to **myPay** and print the 1099R out of the comfort of your own home

1. Go to <https://mypay.dfas.mil>
2. Enter the Login ID on the home page.
3. Enter the password.

Access the 1099R from the "Main Menu" by clicking on the "Tax Statement 1099R"



If your member is not a **myPay** user yet, then the fastest and easiest way to get a copy of the 1099R, besides **myPay**, is to use our telephone self-service option. Telephone self service requests are logged instantly and are sent to the member's current address of record within three business days.

Telephone self-service can be used 24 hours a day, 7 days a week. There is no need to speak with a representative, wait on hold, or even use a computer for this system.

1. Call 800-321-1080.
2. Select option 1 for Military Retired and Annuitant Pay.
3. Select option 1 "To use our automated self-service system."
4. Select option 1 to request your 1099R any time of day.
5. Enter your Social Security Number when prompted.
6. Your 1099R should be in the mail within 3 days to your address we have on record.

If the member is not a **myPay** user, and the mailing address we have on file is out of date, the easiest quickest way to get the 1099R sent to an updated address is to submit the request through the internet as described in the article above. Members can update their mailing address, enter the email address, and request their 1099R be sent to the new address using one easy form. Their transaction will be logged instantly and it will be in the mail to you within 7 to 10 business days. The form can be found at <http://www.dfas.mil/retiredmilitary/manage/taxes/getting1099r/viaaskdfas.html>.

Additional Ways to Access 1099R Continued.

If the member prefers traditional mail, they can send us a written request by fax or mail. Make sure they leave us time to reply as it takes us 30 to 60 days to process requests received by fax or mail. Find complete instructions here:

<http://www.dfas.mil/retiredmilitary/manage/taxes/getting1099r/viawrittenreq.html>

Members with unique situations can speak directly to one of our customer care representatives. Depending on call volume, they may have to wait on hold while we assist other customers. Call 800-321-1080.

SBP Questions

Many of the questions in our quarterly calls center on understanding the Survivor Benefit Plan. We decided to pull together an article featuring responses to some of the most frequent questions we have had in our calls. We are also providing some background information on the SBP plan to provide context for the questions and responses.

The information in this article is intended as a summary treatment of some subjects for RSO's in the field. It is not intended to be shared directly with members to guide their election process. Nor is it intended to provide authoritative administrative guidance. A complete and detailed description of SBP can be found at <http://militarypay.defense.gov/Benefits/SBP.html>. DFAS provides a treatment of the SBP plan's major provisions at <http://www.dfas.mil/retiredmilitary/provide/sbp.html>. These websites are the most important tools for any RSO looking to understand the provisions of the SBP plan overall.

SBP Basics

Retired pay stops with the death of the retiree. The Survivor Benefit Plan was created to permit a retiree to provide a portion of his or her retired pay to an elected beneficiary or beneficiaries after his or her death. The SBP benefit is inflation protected as the base amounts, premiums and annuity amounts are increased with each cost of living increase applied to retired pay. Coverage is available for a spouse, former spouse, children, a combination of spouse or former spouse with children, or a insurable interest person (such as a business partner or parent) if there is no spouse at retirement.

The SBP annuity will generally be 55% of the base amount selected for coverage. The base amount can be the maximum of the gross monthly retired pay entitlement, or any lesser dollar amount down to the \$300.00 minimum.

At retirement, a member must elect SBP coverage. He or she must also elect the type of coverage desired. However, if a member is married, he or she may not reduce or decline spouse coverage without his or her spouse's written consent. If a member is married and has made no other valid election, the full basic SBP for spouse and children is automatic. If a member has a former spouse, that may affect his or her options.

In general, once a SBP election has been made, it cannot be canceled or changed except in specific instances such as a change in your marital status or after the loss of a beneficiary.

Q1: What happens if a member elects SBP coverage, then after retirement decides he or she no longer wants coverage?

SBP is an irrevocable election. The only circumstances in which a member can remove SBP coverage are:

- loss of beneficiary (death, divorce, child age, etc.)
- termination of coverage during 25-36 months of retirement (must be made on DD Form 2656-2)
- withdrawal due to VA disability (member must be rated 100% by DVA for five consecutive years beginning at retirement -OR- member must be rated 100% by DVA for ten consecutive years beginning after retirement)

SBP Questions Continued...

Q2: What happens if a member wishes to make an election requiring spousal concurrence, but the spouse is unable to sign documentation due to being unavailable?

If an election requires spousal concurrence, then that concurrence must be obtained and obtained in the proper form before the election is valid. If the member wishes his or her election to become valid, the form(s) must be mailed, faxed, emailed, etc. to the spouse for signature. Whether the spouse is across the country or even the world, he/she must still sign documentation and validate his or her signature with an appropriately signed and dated notarization.

If the spouse's whereabouts are truly unknown, the Secretary of the member's branch of service may be able to exempt the member from the spouse signature requirement.

Q3: Is it true that the surviving spouse of a member receiving a SBP benefit will lose the benefit if he or she remarries?

If a surviving spouse annuitant remarries before the age of 55, he or she will lose their benefit. However, the benefit will be reinstated if the new marriage ends for any reason (death, divorce, annulment).

If a surviving spouse annuitant remarries after the age of 55, his or her benefit will not be affected.

For former spouse SBP beneficiaries (in cases in which the member is still alive), FS SBP coverage is suspended upon remarriage prior to 55. In these cases, coverage be reinstated if remarriage ends for any reason (death, divorce, annulment).

Q4: What information in regards to Former Spouse SBP are we authorized to release to former spouses?

The information we are allowed to divulge is limited to:

The level of coverage (**can divulge only if the FS is beneficiary**)

The amount of the annuity payable (**can divulge only if FS is beneficiary**)

Q5: What rules govern changing SBP coverage from a Former Spouse to a current Spouse upon the death of the covered Former Spouse?

- ▶ Effective January 8, 2014, DFAS' Office of General Counsel clarified the laws regarding the change of SBP coverage from Former Spouse to Spouse upon the death of the former spouse.
 - ✓ Situation 1: Any retiree who is married and elects Spouse coverage at retirement, then divorces that spouse and elects Former Spouse coverage for the former spouse, **CANNOT** elect to cover his/her current spouse upon the former spouse's death.
 - It **does not matter** whether or not the Former Spouse SBP coverage was court-ordered. Once the former spouse dies, the retiree cannot add his/her new spouse to the SBP
 - The **ONLY** circumstance under which a retiree in Situation 1 can change his/her SBP coverage from Former Spouse to Spouse is if the change is made while the Former Spouse is **alive**
 - ✓ Situation 2: Any retiree that has BOTH a spouse and former spouse at retirement, who elects Former Spouse SBP coverage pursuant to a court order, **is eligible** to change his/her SBP coverage to Spouse upon the former spouse's death.

SBP Questions Continued...

- This is because the retiree's actual spouse was an eligible beneficiary at retirement, but the retiree was required by a court order to establish Former Spouse coverage
- If the retiree made a voluntary election for Former Spouse coverage at retirement, while he/she also had a current spouse, then SBP the coverage cannot be changed to spouse upon the former spouse's death.

Board of Corrections Address by Branch of Service

Army	Navy and Marine Corps	Air Force
Army Review Boards Agency 251 18 th Street South, Suite 385 Arlington, VA 22202-3531	Board for Corrections of Naval Records 701 S. Courthouse Road, Suite 1001 Arlington, VA 22204-2490	Board for Correction of Air Force Records SAF/MRBR 550-C Street West, Suite 40 Randolph AFB, TX 78150-4742

DFAS Contact Information

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Phone: 216-204-3099

NAVY/MARINES: Timothy Jackson

Email: timothy.r.jackson16.civ@mail.mil

Phone: 216-204-2461

Our new email box is: dfas.cleveland-oh.jfb.mbx.service-liaison@mail.mil. Please add it to your contacts.

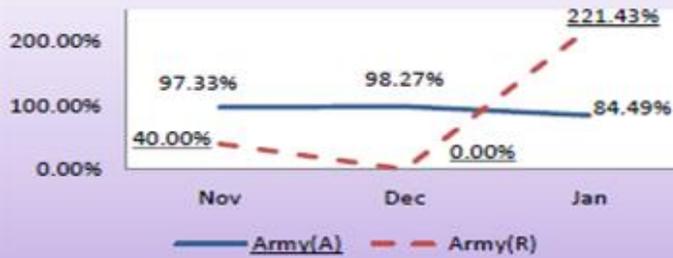
Month	Pay Dates	Cut Off Dates
March	4/1/2015	3/20/2015
April	5/1/2015	4/21/2015
May	6/1/2015	5/19/2015
June	7/1/2015	6/19/2015
July	7/31/2015	7/21/2015
August	9/1/2015	8/20/2015
September	10/1/2015	9/21/2015
October	10/30/2015	10/20/2015
November	12/1/2015	11/18/2015
December	12/31/2015	12/10/2015

Feedback

Is there something you would like to see in our next issue? Let us know! You can contact Tameka.L.Smith2.civ@mail.mil with your suggestions.

If you have questions about case processing or a specific retiree or annuitant's account, you should contact your DFAS Service Liaison.

ARMY



Rank ACTIVE

- 03031: 1405 Svc may not be greater than Svc for Pay.
- 10040: Minimum active service requirement not met.
- 03007: Current grade effective date does not meet date format of (YYYYMMDD).

Rank RESERVE

- 03020: Projected Retirement Date does not meet date format of (YYYYMMDD).
- 03021: Minimum Retirement Age not met; Age 60 for Reserve or Mandatory Retirement that have stipulations.
- 03005: Grade has been entered incorrectly.

AIR FORCE



Rank ACTIVE

- 10040: Minimum active service requirement not met.
- 03072: Commission Service Date Required for Officers.
- 03030: SVC-1405 does not pass the standard service edit.

Rank RESERVE

- 02266: Account has already been established and is in a Pay Active status.
- 03049: Retirement eligibility date is after the Separation (Projected) effective date.
- 03018: 1332 Service must be 200000 or greater or the member is a TERA and the 15-YR-IND must be Y.

MARINE CORPS



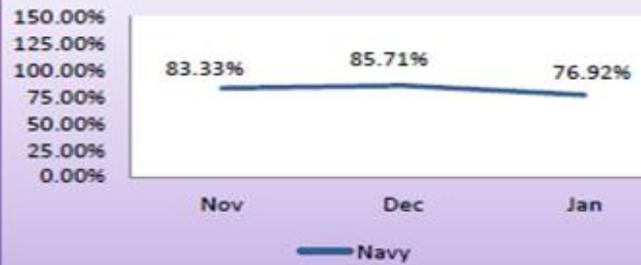
Rank ACTIVE

- 03026: Service entered incorrectly or left blank..
- 03030: Service entered incorrectly or left blank.
- 03028: Service entered incorrectly or left blank.

Rank RESERVE

- 03047: Retirement eligibility date is required on reserve retirements.
- 03018: 1332 Service must be 200000 or greater or the member is a TERA and the 15-YR-IND must be Y.
- 03119: 20 year qualification date is > retirement eligibility date in error.

NAVY



Rank NAVY

- 03295: CSB must be 2 or 3 if DIEMS => 860801 & ACT-SVC is => 15 yrs.
- 03061: Service COMP date must be "R" for Ret. Law.
- 02266: New Gain action matches completed account -- Duplicate Entry.

* Error rates may exceed 100%. This is caused when a single account has rejected containing multiple errors. Note: A case with multiple errors will only reject once.