Customer Online Tools—Information Guide for Annuitants

DFAS Retired and Annuitant Pay is working hard to communicate better and make your experience with us easier. The Retired Military & Annuitants (DFAS.mil) webpage is a great place to start to learn about all of these updates. Our main 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 Events section, as well as our Retiree Newsletter.

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 (https://mypay.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 **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. Many of these **Form Wizards** also have a helpful link to submit the form through askDFAS online upload tools for that category of requests.

askDFAS Online Upload Tools

We are also 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 and 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 use askDFAS. Please visit our newly redesigned askDFAS resource page: https://www.dfas.mil/askDFAS

Status Notifications

When you submit certain requests, DFAS will send email status notifications 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 was received and will be processed. We will send you updates when we receive your request, when the request is assigned, and when the request has been completed.

myPay

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 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.

What is askDFAS?

askDFAS is part of the www.DFAS.mil website providing responsive services to you. Our site lets you request support byasking questions, requesting tax documents, and now, sending us forms to process for your pay account.

Submit Your Forms in askDFAS!

Retired and Annuitant Pay developed a set of user-friendly online upload tools to allow you to submit forms and requests faster and easier. Individual category requests can now be submitted via the Helpful Online askDFAS Upload Tools located on [www.DFAS.mil.](http://www.DFAS.mil)

The new askDFAS online upload tools were established to improve the way requests are submitted and eliminate the timesending requests through mail or fax. You can now send your forms as PDFs from your home computer.

To send us a form/documentation, simply click on the **Submit A Ticket** button on the askDFAS homepage. You will then click on the arrows next to **Retired Pay Form Submission.** A list of forms will appear, with all of the upload tools available. If your request does not match any of the specific subcategories, you may upload the file(s) to the new

General Retiree Documentation subcategory.
- Look for the askDFAS icon at the top of the DFAS.mil webpage to get started or use the link below.
- Learn more about askDFAS: https://www.dfas.mil/askDFAS (click on Retirees and Annuitants)
- Try 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 as a PDF 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 was 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 processing system. 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 online upload tools, 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 upload tool options is not available in askDFAS, please use the new **General SBP Annuitant Documentation** subcategory found within the Retired Pay Form Submission category of askDFAS.

Email Status Notifications

Email Status notifications are here! For certain requests, DFAS will send status notifications with progress updates on your requests.We will send you updates when:

1. We **receive** your request
2. We **assign** your request for review and processing
3. We **complete the review**, in which case you will be notified either that:
a. We received all information needed and your request was **completed**; or
b. We were **not able to complete** your request, in which case we will mail you a letter requesting additional information.

There are 2 ways to receive notifications:

1. For most askDFAS online upload tools within the Retired Pay Form Submission category, 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 submitted.
2. For many transaction types, if you send a form or request to us using fax or mail, we will send updates to you using the email address registered in your myPay account. You can review and update your email address in myPay at any time. https://myPay.dfas.mil

Visit the Retired Military and Annuitant Website!

https://www.dfas.mil/rapay

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 Survivor SBP Newsletter!

https://www.dfas.mil/survivornews

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/raforms

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

When clicking on a form and it does not automatically open in your browser, you will need to either download or save a copy to your personal computer. Go to the location in which you saved the form, and open it from there. Click on Enable ALL Features and the form will open.

Form Wizards – Taking the form out of the form!

https://www.dfas.mil/raforms

R&A Pay is working to develop new form tools to help you fill out and submit required forms correctly and more easily. The Form Wizards offer 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/managesbp.

How long does it take to process a request?

https://www.dfas.mil/rahowlong

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 required information.

Question About Managing Your SBP Annuity Pay Account?

Manage Your SBP Annuity

https://www.dfas.mil/managesbp

Find out what you need to know to manage your SBP annuity payments on our "Manage Your SBP Annuity" webpage.

It's very important that you keep your contact information up to date so we can reach you with important news and documents.

Annuitant Eligibility Verifications

https://www.dfas.mil/managesbp

SBP annuitants need to verify their continued eligibility regularly to receive SBP annuity payments. There are several types of verification. See the verification requirements on the "Manage Your SBP Annuity," webpage where you can also download the SBP Annuitant Eligibility Verification Requirements Fact Sheet:

Child SBP Annuitants Age 18-22 School Certifications

https://www.dfas.mil/schoolcerts

A child's eligibility to receive SBP payments ends when the child turns 18 unless proven to be in school or incapacitated/incapable of self-support and/or handling their own affairs. If a child annuitant attends school full-time (in high school or at an accredited college or university), the SBP annuity payments can continue until they reach age 22 or otherwise become ineligible. SBP child annuitants between 18 and 22 years old must regularly certify their status as an unmarried, full-time student to continue to receive annuity payments.

Use myPay to Manage Your SBP 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 our 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

Annuity Pay account updates:
- Change mailing address or email address
- Change federal tax withholding
- Change Direct Deposit information

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/raforms

➢ **DD 2656-7**   Verification For Survivor Annuity
- Note: This form includes the options for electronic signature and a one-click askDFAS button to directly submit the form via askDFAS.
➢ **DD 2788**   Child Annuitant's School Certification
- Note: This form includes the options for electronic signature and a one-click askDFAS button to directly submit the form via askDFAS.
➢ **DFAS 9415**   Representative Payee Certification
- Note: Once this form is generated it must be printed and signed. The completed form can then be uploaded and submitted via askDFAS.

Annuity Assistance:		
Annuitants' Startup Forms		
DD 2788 Form Wizard DD 2788 Printable PDF Form Helpful tools and how-to information	Child Annuitant's School Certificate	
DD 2790 Helpful tools and how-to information	Custodianship Certificate of Minor Child	How-To Checklist How-To Video
FMS 2231	Fast Start Direct Deposit	
SF 1199-A	Direct Deposit Enrollment	
IRS W-4P	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	
DFAS 9415 Annuitant Representative Payee Certification Form Wizard DFAS 9415 Fillable - Use this version to fill in the form on your computer. You will need PDF software to use this version. DFAS 9415 Print Only - Use this version if you want to print out and fill in the paper form. Helpful tools and how-to information	Representative Payee Certification	
DD 2656-7 Form Wizard DD 2656-7 Printable PDF Form Helpful tools and how-to information	Verification for Survivor Annuity	

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. <u>Check back often as we continue to add more forms to submit.</u>

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 within the **Retired Pay Form Submission** category:
➢ **General SBP Annuitant Documentation**
➢ **DD 2656-7** Verification For Survivor Annuity
➢ **Annuitant DOHA Appeal Submission**
➢ **DD 2828** Physician Certificate for Child Annuitant
➢ **DFAS 9415** Representative Payee Certification

List of annuitant forms available for askDFAS submission within the **Annuitant Pay Documentation** category:
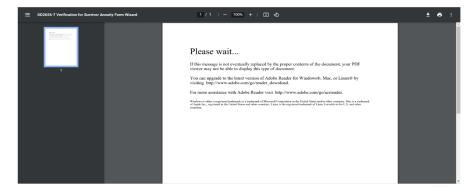➢ **DD 2788** School Certification
➢ **SBP Marital Status Update (SBP-MSU)**

DFAS Forms Webpage

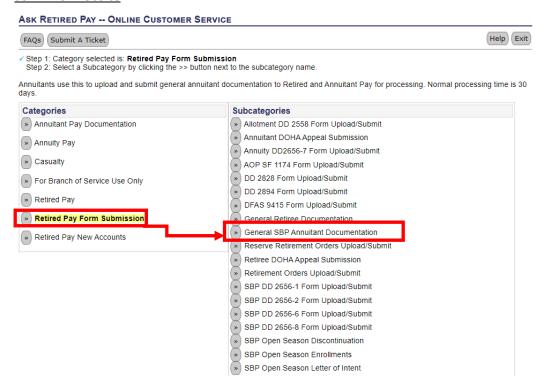| Annuity Assistance:	
Annuitants' Startup Forms	
DD 2788 Form Wizard DD 2788 Printable PDF Form	Child Annuitant's School Certificate
Helpful tools and how-to information	

Please note:

When using Chrome, Edge, Firefox or Safari to access an Adobe PDF Form on our website, the user initially gets the below message. The user must download or save the PDF (by clicking the download icon in the upper right-hand corner of the page), then open the PDF in a compatible PDF reader and click the "Enable All Features" button. Then the form will be viewable.

askDFAS Website

Also, if you are using a MAC computer to download a form wizard and are experiencing an issue, please ensure you have the proper version of Adobe. Below is the link for the MAC OS version.
https://helpx.adobe.com/acrobat/kb/install-reader-dc-mac-os.html#:~:text=You%20need%20macOS%20version%2010.13,Adobe%20Reader%20on%20Mac%20OS