



# Retired & Annuitant Pay

*Defense Finance and Accounting Service*

Retiree Appreciation Seminar



# Flashback – What You Told Us



- ✓ Many of you had received 1099's in mail for years only to have them stop coming 3 years ago
- ✓ Why is there not an automated way to report a survivor death (like tools to report retiree death)?
- ✓ Will there be more form wizards available in the future?
- ✓ This is all great but how do I find all this stuff?
- ✓ How do we eliminate the administrative burden for our customers?



- ✓ Using your feedback on 1099 non-receipt, did some digging to resolve problem
- ✓ Began phased improvement plan to include website updates and provide automated tool to report survivor death
- ✓ Form wizards added: DD2656-6 (November 2023)
- ✓ Continued revamp to websites for easier navigation
- ✓ 2022 NDAA Streamlining Certification Process



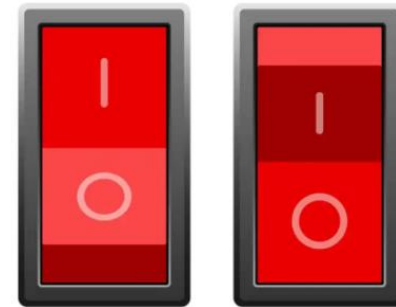


## No 1099 in the mail?

- ✓ No Address Change
- ✓ No Account Change
- ✓ No myPay Account

Accounts were erroneous flipped to electronic delivery by our system

- Dug in to find root cause
- Flipped over 6K overseas accounts back to mailed 1099's  
Received positive feedback from our RSO's and POC's





## Current State

- ✓ Only Retirees can use the Notification of Death Tool on askDFAS
- ✓ Reporting the death of an Annuitant by phone/mail/fax
- ✓ Especially challenging for overseas customers

**We heard you!**



## Future State

- ✓ Annuitant Notification of Death Tool on askDFAS
- ✓ Development beginning—be on the lookout for more information into 2024!





## ► Resources to assist customers today!

### ✓ Webpage Upgrades

- When a Retiree Passes Away **URL**
- When an SBP Annuitant Passes Away **URL**

### ✓ Checklists to make the process smooth



# Coming Soon: DD Form 2656-6 Form Wizard



## The Survivor Benefit Plan Election Change Certificate - DD Form 2656-6 will become the newest addition to our suite of Form Wizards

**DFAS Survivor Benefit Plan Election Change Certificate**  
DD Form 2656-6

### Welcome!

Completing and filing a Survivor Benefit Plan Election Change Certificate (DD Form 2656-6) has never been easier. Just answer some simple questions about you, your current coverage, and the status of your prior and current dependents. We will help guide you through the form to ensure it is completed accurately and ready to submit on your first attempt!

Never completed a Survivor Benefit Plan Election Change Certificate? No problem we have you covered.

- What is a DD Form 2656-6 - Survivor Benefit Plan Election Change Certificate?**  
The DD Form 2656-6 is used to change your Survivor Benefit Plan beneficiary when you have experienced a qualifying life event after retirement. A retired member may change their beneficiary or update their election status within one year of the date of certain certifying circumstances/qualifying life events (e.g. marriage, remarriage, divorce, death of spouse, or acquiring a dependent child).
- How to use this form?**  
We will ask you a series of questions and based on your response, we will fill in your answers in the appropriate areas of the DD Form 2656-6.  
If at any time you think you made a mistake or simply want to revisit something, you can utilize the menu at the top of the form to navigate back to any of the individual screens (e.g. "Beneficiary Info" or "Current Coverage").  
The DD Form 2656-6 can be saved to your computer. However, we do NOT recommend saving the document to a shared computer because it contains personally identifiable information.
- How do I submit my DD Form 2656-6?**  
When you have finished answering all required questions, you will be able to generate the completed PDF form.  
After generating your completed form, you will need to print, sign, and date your Survivor Benefit Plan Election Change Certificate in the presence of a notary or SBP counselor before sending it to DFAS, along with any supporting documentation.  
We will provide more information about where to submit later, but for now feel free to get started by clicking start!

[Start](#)

**DFAS Survivor Benefit Plan Election Change Certificate**  
DD Form 2656-6

### Review

You're almost finished!  
Let's review the information you entered to make sure there is nothing missing before we generate your completed MOCAS Reconciliation Division Action.  
**ALL FIELDS HAVE BEEN COMPLETED** - All fields have been completed! When you're ready, confirm you have the required documentation and click next. You're well on your way to generating your completed Survivor Benefit Plan Election Change Certificate.

<i>All Fields Have Been Completed!</i> Personal Information	<a href="#">Review</a>	<b>IMPORTANT:</b> Please provide supporting documentation to support your requested election change.  Required documentation to support your request may vary based on the type of change you're requesting. Supporting documentation may include any of the following: <ul style="list-style-type: none"><li>• Marriage Certificates</li><li>• Birth Certificates or applicable court document</li><li>• Divorce Decree</li></ul> DFAS reserves the right to request additional supporting documentation to substantiate any requested changes.  Failure to provide supporting documents may delay or prevent consideration of your request. <input checked="" type="checkbox"/> * Before continuing, please confirm you have the required documentation to support your request and acknowledge the statement above.
<i>All Fields Have Been Completed!</i> Change in Coverage	<a href="#">Review</a>	
<i>All Fields Have Been Completed!</i> Requested Change	<a href="#">Review</a>	
<i>All Fields Have Been Completed!</i> Spouse/Children's Information	<a href="#">Review</a>	

[Continue](#)

# Wayfinding Webpage: askDFAS Landing Page



#1

https://www.dfas.mil

An official website of the United States government [Here's how](#)

**DFAS** DEFENSE FINANCE AND ACCOUNTING SERVICE  
PROVIDING PAYMENT SERVICES FOR THE U.S. DEPARTMENT OF DEFENSE

Search Defense Finance

myPay

f y t in ASK/DFAS

MILITARY MEMBER RETIRED MILITARY & ANNUITANT CIVILIAN EMPLOYEE CONTRACTOR & VENDOR

#2



#3

- This section provides military retirees with commonly requested resources
- Manage your retired pay account via myPay
  - Request a duplicate tax statement (1099-R)
  - Report the death of a military retiree
  - Update your mailing address
  - Request a Verification of Pay
  - Submit documentation of a life-changing event
  - **Submit a form to DFAS using our askDFAS online upload tools**
  - Retired & Annuitant Pay Form Library and Tips/TOOLS
  - All other questions

#4

### Submit a Form To DFAS Using Our askDFAS Online Upload Tools

- Use the handy **askDFAS online upload tool** to submit your forms to DFAS for processing.

#5

### ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE

FAQs **Submit A Ticket**

Providing responsive, professional finance and accounting servi







- ▶ Concept: Find the most-requested tools quickly
  - ✓ Prioritized according to customer feedback and highest call drivers
- ▶ Available now! <https://www.dfas.mil/raquicktools>

## Quick Tools for Retirees, SBP Annuitants and Survivors

Links to our most popular self-service tools for **retirees**, Survivor Benefit Plan (SBP) **annuitants**, and **survivors** are available below for your convenience.. For news and additional resources, [please visit our other web pages on DFAS.mil](#).

**Retirees, start here**

**SBP Annuitants or Survivors, start here**

To **Report the Death** of a **Retiree** using our convenient online tool, [click here](#).

To **Report the Death** of an **SBP Annuitant**, [click here](#).

## Retirees

### 1099-R Online Reissue Tool

**Request a duplicate mailed copy of your 1099-R** using our convenient online tool. The IRS Form 1099-R is used to report the distribution of retirement benefits such as pensions and annuities, similar to a W-2 for taxable wages. DFAS issues 1099-Rs, either



# Wayfinding Webpages: Planned Upgrades




## Forms Library + “Start Here” Enhancements


### Need Forms?

Click to find them

- Retirees
- SBP Annuitants



## askDFAS Category / Subcategory Realignment



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

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**ASK RETIRED PAY -- ONLINE CUSTOMER SERVICE**

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

Step 1: Select a Category by clicking the >> button next to the category name.

Categories	Subcategories
<a href="#">» Annuitant Pay Documentation</a>	
<a href="#">» Annuity Pay</a>	
<a href="#">» Casualty</a>	
<a href="#">» For Branch of Service Use Only</a>	
<a href="#">» Retired Pay</a>	
<a href="#">» Retired Pay Form Submission</a>	
<a href="#">» Retired Pay New Accounts</a>	



# Replacing the ROE with FAUMC



- ▶ Retirees and Annuitants receiving hardcopy checks mailed to a foreign address are required to verify they are alive and therefore still eligible for retired pay to avoid improper payments.
- ▶ Current Report of Existence (ROE) required twice-yearly to verify customers is still living for those with hardcopy checks to a foreign address.
- ▶ Starting in August 2023, the FAUMC will be systematically sent to customers on the same schedule as the ROE for their Date of Birth.
  - ✓ Only required once per year going forward
  - ✓ Processing the new FAUMC will be the same as processing the current ROE.
  - ✓ The ROE currently sent out will be accepted through the end of 2024
  - ✓ Similar to the letter retirees use





## **myPay Website** <https://myPay.dfas.mil>

- ✓ Not only can you access your account from here, but there are also multiple resources available, including FAQs, ASK myPay, Quick Links, System Availability, and myPay announcements.

## **DFAS Website** <https://www.dfas.mil/mypayinfo/>

- ✓ You'll find myPay release information, tips and other news on the DFAS official website.

## **Ask myPay** <https://corpweb1.dfas.mil/askDFAS/custMain.action?mid=2>

- ✓ Browse frequently asked questions and answers or submit a question of your own using the Ask myPay application.

## **myPay on Facebook** <https://www.facebook.com/DFASOfficial>

- ✓ Follow DFAS on Facebook to get up-to-date information on system availability and other myPay



# If You Have Questions



[www.dfas.mil](http://www.dfas.mil)

A screenshot of the DFAS website header. On the left is the DFAS logo, a blue checkmark with a white star. To its right is the text 'DEFENSE FINANCE AND ACCOUNTING SERVICE' in large blue letters, followed by 'PROVIDING PAYMENT SERVICES FOR THE U.S. DEPARTMENT OF DEFENSE' in smaller blue letters. A yellow arrow points down from this text to a dark blue navigation bar containing the following text: 'MILITARY MEMBER', 'RETIRED MILITARY &amp; ANNUITANT', 'CIVILIAN EMPLOYEE', and 'CONTRACTOR &amp; VENDOR'. On the right side of the header, there is a search bar with the text 'Search Defense Finance' and a magnifying glass icon. Below the search bar is a dark blue bar with the 'myPay' logo and a key icon. A yellow arrow points down from the 'myPay' logo to a row of social media icons: Facebook, YouTube, LinkedIn, and 'ASK DFAS'.

**Customer Care Center:**  
**(216) 522-5955 or Toll-free (800) 321-1080**  
**M-F 0800-1700 Eastern Time**

