

OFFICER RETIREMENT PACKET

**"Retirement is a Process,
NOT an Event"**

PACKETS MUST CONTAIN THE FOLLOWING DOCUMENTS:

1. PAR requires the following:
 - * Officer Retirement Request Memo
 - * Officer Endorsement Memo
 - * Sexual Assault Memo
 - * Active Duty Obligation Memo (ADSO)
 - * Tuition Assistance Acknowledgement Memo
 - * Soldier Talent Profile

2. Additional Documents Required
 - * LES
 - * Copy of all Contracts
 - * Prior DD 214s (if applicable)
 - * Officer Appointment Orders
 - * Service Computation for Reserve/NG time (if applicable)
 - * Updated DD 93 (dated within 6 months)
 - * Updated SGLI
 - * Administrative Absence Request (Approved by LTC - 05/ OR COL 06)

ALL DOCUMENTS ARE REQUIRED FOR PROCESSING A RETIREMENT PACKET

Active Duty retirement applications must be submitted to Retirement Services Office by Unit S1 to the following:

UDL: 000000000037389

RETIREMENT REQUEST INFO SHEET:

Name/Rank: _____

EMPL ID: _____

1. IAW AR 635-200, Chapter 12 (Enlisted), or AR 600-8-24, Chapter 6 (Officer) request voluntary retirement effective (dd/mm/year) Last day of month.
2. I understand that I must submit this request in a timely manner (NET 24 months and NLT 9 months prior to retirement date).
3. **Authorized** Transition Location:
4. **Requested** Transition Point (at no expense to the Government):
5. I (have/have not) met all service remaining obligations and {do/do not} require a waiver. (Attach justification for waiver if applicable).
6. I (am/am not) currently on the DA Promotion Selection List.
7. I {am/ am not} currently flagged per AR 600-8-2.
8. I (have/ have not) been alerted for assignment instructions. Cycle# and date:
9. I (did/did not) elect to take the Career Status Bonus (CSB/REDUX).
10. I tentatively request administrative leave
11. I request administrative leave for _____ days. start: _____ ends: _____
12. Government Email Address:
13. Duty #: _____ Home #: _____ Cell #: _____
14. Current mailing address:
15. Mailing address after separation:

OFFICE SYMBOL
SUBJECT: Voluntary Retirement

will take effect on the requested date and that I will not be held on active duty to complete this examination.

8. In accordance with Title 10, United States Code, I understand that –

a. Enrollment in the Survivor Benefit Plan (SBP) is the only way that I may continue a portion of my retirement pay to my Family at my death.

b. I must receive SBP counseling for myself and my spouse no less than 20 days before retirement.

c. I will be enrolled in full SBP coverage if I fail to elect otherwise in writing before my retirement.

d. I cannot elect less than full spouse SBP without my spouse's written agreement. I realize there are other forms that must be completed during SBP counseling.

e. Failure to return the completed spousal concurrence statement to the proper officials prior to my retirement packet being sent to the Defense Finance Accounting Service will result in my being irrevocable and irreversibly enrolled in SBP at full cost.

9. Address on retirement: (Enter a reliable forwarding address for mail.)

10. I am familiar with AR 600-8-24, paragraph 6-12, and understand that if the Secretary of the Army accepts this application, it may not be withdrawn except for extreme compassionate reasons or for the definitely established convenience of the Government.

11. If AR 600-8-24, paragraph 6-16, is applicable, continue with the information required by paragraph 6-16d.

12. As of the date of this application, I have (number) of days accrued leave. I (do/do not) plan to take administrative leave. (If applicable, complete the following) I plan to take (number) days administrative absence.

13. I understand the provisions of AR 600-8-24 pertaining to determination of my retired grade. Considering those provision and after a review of my records, I believe that I am entitled to retire in the grade of (grade). I understand that final determination of my retired grade will be made by HQDA and that I will be informed if I am not entitled to retire in the grade I have specified in this paragraph.

14. This applicate (is/is not) submitted in lieu of complying with PCS instructions.



DEPARTMENT OF THE ARMY
ORGANIZATION
STREET ADDRESS
CITY STATE ZIP

Office Symbol

Date

MEMORANDUM FOR Human Resources Directorate, ATTN: IMNE-HRM,
Retirement Services Office, 1401 Barfoot Avenue, Fort Gregg-Adams, VA 23801

SUBJECT: Request for Voluntary Retirement (Rank Name, SSN, MOS)

1. Recommend Approval.
2. Point of contact is : _____ at ()

Commander's
Signature block

RETIREMENT INFORMATION SHEET

- *Below are important steps to take prior to your final out with Retirement Services Office (RSO).*
- (1) **Administrative Absence** *Submit approved copies of your Administrative Absence prior to final out with control number to RSO. Your installation clearance will be delayed until received as such.*
 - (2) **Retirement Ceremony** – If you request to participate in the post-retirement ceremony, contact Mrs. Kathleen Wright (804) 734-6412/7299 located at Building 1107, Corner of Barfoot Ave and First Street, Room 215 Fort Gregg-Adams, VA 23801. **ALL AWARDS MUST BE COMPLETED AT LEAST 4 WEEKS PRIOR.** ** If you wish to participate in a retirement ceremony at a different installation, inform RSO for further instructions.
 - (3) **Retirement Physical** **YOU** are responsible for ensuring you take a retirement physical **NOT EARLIER THAN 6 MONTHS PRIOR** to your departure on Administrative Absence, and **NO LATER THAN 30 DAYS PRIOR** to your actual retirement date. You **MUST** make an appointment for part one by calling (804) 734-9057.
 - (4) **VA 21-526 – Veteran's Application for Compensation or Pension (VA Claim).** A representative is located at Fort Gregg-Adams Soldier Support Center Room 107A (Inside Retirement Services Office), call to schedule an appointment at 804-734-7750. See attached VA's Pre-Discharge Claim Checklist (Benefits Delivery at Discharge (BDD) Program).
 - (5) **Survivor Benefit Plan (SBP)** – It is **mandatory** that **you** and **your spouse** (if applicable) receive Survivor Benefit Plan counseling prior to your final out. During this counseling you will also receive an estimate of your retirement pay. SBP counseling is given by a Certified Survivor Benefit Retirement Services Office (RSO) Counselor. Be sure to complete the SBP worksheet prior to your final out, even if you are declining coverage. Once a SBP election is made it cannot be changed once retired; you can terminate SBP one-time during a one year window between the 25th and 36th month of being retired (spouse concurrence required) or you can change your election during an open season, unless SBP was declined during that open season period. SBP information is located at www.armyg1.army.mil at the link Retiree.
 - (6) **DD214 Worksheet (Certificate of Release or Discharge from Active Duty).** This document should be carefully reviewed before final out. You will receive your final DD214 (member 1 and member 4) at your final out appointment with RSO. **** Make sure to update your Soldier Talent Profile with your S1 before your Final Out Appointment to include Awards and Education.**
 - (7) **Finance and Accounting Office** – You must call (804) 734-6360/7287/7623 to schedule an appointment or finance clearing. Be sure to bring copies of your

Administrative Absence with control number. ***Your local finance office pays your last Active Duty Paycheck.***

- (8) **Final-Out Appointment** – You will be contacted with a scheduled appointment to Final out. Failure to show up for your scheduled appointment will result in delay of your out-processing. Upon your final appointment, you will receive a Retirement Certificate, Flag, Certificate of Appreciation, Lapel Button and Spouse Certificate (if applicable).
- (9) **Health and Dental Records** – Turn in **ORIGINALS** records to MTF during final out-processing. MTF will turn in your records to the VA once out-processed. Be sure you request **2 certified copies** of your records for your personal use.
- (10) **SERVICEMEMBER GROUP LIFE INSURANCE (SGLI)/DD FORM93** – Soldier **must** make an appointment with their Unit to have this form updated. Be sure to submit this updated document with your retirement packet to RSO. ***Date on form cannot be more than 6 months from final out date.** You will not Final Out without turning in this document.
- (11) **ID Card/DEERS** – Call and make an appointment to get a retired ID card for you and your Family @ 804-734-6970/7394/7348/6179. You will need to bring a copy of your **DD214 and retirement orders**. If you are leaving the Fort Gregg-Adams area you can go to any installation with the appropriate documents.
- (12) **TRICARE** – Call 1-877-874-2273 or visit <http://www.tricare.mil>. Enrollment into Tri-Care Select or Prime must be done within 30 days after separation date so there will be no lapse in coverage.
- (13) **FEDVIP DENTAL PROGRAM** – Will require yearly enrollment. For more information or enrollment visit www.tricare.benefeds.com/infoportal. Enrollment into Dental must be done within 30 days after separation date so there is no lapse in coverage.
- (14) **Veterans Group Life Insurance (VGLI)** – To convert your SGLI or find out about premiums call 1-800-419-1473 or visit <http://www.insurance.va.gov/sgliSite/VGLI.htm>. Service members may convert SGLI to VGLI within 240 days after Retirement Date without a statement of good health.
- (15) **SOLDIER FOR LIFE (SFL)** – website is <http://soldierforlife.army.mil/retirement>. Be sure to update your email to a civilian address. This will allow you access to the Army Echoes and other communication after retirement.
- (16) **Transportation** – Retiring Service Members are entitled to shipment of household goods to home of selection. Contact Transportation Office at 804-734-4187/4449 to schedule an appointment and discuss travel and transportation entitlements from last duty station to home of selection (including Family Members). If living in on-post housing at the time of retirement and required to vacate the quarters, contact Housing Services Office at (804) 765-1963/2106. You will be entitled to move within a 30 mile radius.

- (17) **Unit Clearing Papers** – MUST have Commander's signature and date. * **All Soldiers MUST bring in original unit clearing papers to final out appointment.**
- (18) **Installation Clearing** – RSO will initialize you in ISM to start clearing eleven (11) days from start of administrative absence. **Keep in mind you don't need to pickup clearing papers from Retirement Services.** You will receive your installation clearing papers printout on your final out date.
- (19) **Education Center** – Has gone to an appointment system for clearing. Soldier will need to phone (804) 765-3570 to make an appointment to clear.
- (20) **Space-A Travel** – Retiree may travel within CONUS or OCONUS.
- Allows dependent to travel in CONUS with the military sponsor.
 - May fax request to site; stay on list 60 days.
 - Benefits ends for Family Members with death of retiree.
 - [Http://spacea.info](http://spacea.info).
- (21) **Social Security Tax (FICA) (7.65%)** – FICA is not deducted from retired pay! When eligible, you will draw full Social Security and Full military retired Pay! For more information visit. <http://www.ssa.gov>.
- (22) **SJA** - Are experts on Federal Employment, Foreign Government Employment, and Negotiations with Employers, "Switching Sides", and Rules for Procurement Officials Rules Specific to General Officers Working during Transition Leave, Dividing Retired Pay as Property and Use of Title & Wearing Uniform after Retirement. Call *804) 765-1500/DSN 539-1500.
- (23) **Retire Pay** – paid by DFAS – Cleveland; payment is on the 1st workday of the month (not necessarily the 1st). Pay statement issued **only** when pay changes, may use "mypay" to make online changes and keep correspondence address current. **Call Retire Pay at 1-800-321-1080 or visit <https://mypay.dfas.mil>.**
- (24) **State Tax** – For information on state taxes and states that do not tax military retire pay, visit <http://www.taxesos.com/statetaxes.htm>.
- (25) **Allotments** – Discontinues in retired pay, YOU will have to restart all allotments. 6 discretionary and 9 non-discretionary allotments are allowed. To start, stop or change allotments after retirement, use <https://mypay.dfas.mil>.
- (26) **Concurrent Receipt of Disability Pay (CRDP) and Combat-Related Special Compensation (CRSC)**

CRSC and CRDP were created to restore lost retired pay reduced by a VA waiver. You could be eligible for one or both of these programs. However, you can't receive both

because they both serve the same purpose. If you qualify for both, DFAS will pay you the payment which is more advantageous for you during the phase in period (2005 – 2014).

CRSC is considered special pay for combat-related (5 May 08) disabilities and is NOT subject to the rules and regulations governing military retired pay.

CRDP is restored retired pay for service-connected (5 May 08) disabilities; and is subject to the same taxes and division as your retired pay (i.e. division with a former spouse).

Similarities and Differences

Benefit Information	CRSC	CRDP
Full Concurrent Receipt	Yes	No – 10 Year Phase in Except 100% Ratings
VA Rating Starts At	10%	50%
Federal Tax	Tax Free	Taxed
File Claims	Must Apply	Automatic
Qualified Injury	Combat-Related	Service Connected
Subject to Uniform Services Former Spouse Protection Act (USFSPA)	No	Yes
SBP (Survivor Benefit Plan)	No	Yes
Available to medical retirees with less than 20 years of service	Yes	No
Available to TERA Retirees	Yes	Yes

- **Claimants with 60% - 90% VA ratings**

Basic Eligibility

CRSC	CRDP
AC, RC, NG with 20 years of credible service, medical retiree, or a TERA retiree	AC, RC, NG with 20 years of credible service, or a TERA retiree
10% or greater VA rated injury that is combat-related	50% or greater VA rated injury that is service-related
Receiving military retired pay	Receiving military retired pay
Military retired pay is reduced by VA disability payments (VA Waiver)	Military retired pay is reduced by VA disability payments (VA Waiver)

CRSC vs CRDP – A Decision

Some retirees could be eligible for both programs. Which one will benefit the retiree the most is going to be a very individualized decision. DFAS handles all payments of both programs and looks at retirement pay, disability percentage, offset, and more before any dollar amounts are decided. The retiree should review their individual situation along with the differences between the programs to make the most educated decision.

Combat-Related vs Service Related

Below is a comparison of combat-related situations vs service- related situations.

Situation	Combat-Related	Service – Related
Simulating War		
Must be contributed to “training for combat:	Tactical Road Marches	Routine Road Marches
	Confidence Obstacle Courses	Physical Fitness Training
	Ranger Training (Rappelling	Ranger Training (Battalion Run)
Hazardous Service		
Linked to specific	Flight Duty	Military job related injuries not caused by a specific incident (i.e. Assigned infantry, artillery, engineers, etc.)
	Demolition Duty	
	Parachute Duty	
	Diving Duty	
Instrumentality of War		
Instrument must be used in military training	Routine auto accident in unique military vehicle	Military sedan in civilian vehicle accident
	Tanks, armored vehicles, etc.	Repairing military vehicle in maintenance setting
	Ammunition and explosive devices	Improper use of pyrotechnics
	Lifting artillery round	Off-post weapon incidents
	Rappelling from military aircraft	
Armed Conflict		
Occurred in combat zone	Gunshot wound	Service-related injuries in combat zone (i.e., maintenance)
	Shell fragment wounds	Sporting events/recreational activities in a hostile area
	Aircraft shot down	Diseases by nature not considered Presumptive (stress-related heart disease, high blood pressure, etc., unless doctor indicates otherwise)
	Terrorist Bomb	

	Post- Traumatic Stress Disorder (PTSD)	Post Traumatic Stress Disorder (PTSD) – Non Combat
	Prisoner of Ware (POW > 30 days)	

Resource for additional information:

<https://www.hrc.army.mil/site/crsc/CRSCvCRDP.html>

<https://www.hrc.army.mil/site/crs/eligibility.html>

DO NOT DELAY!!!

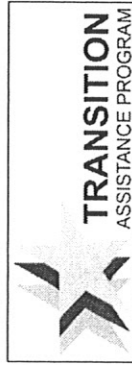
Waiting to schedule your appointments until you are clearing or closing in on your administrative absence, may result in a delay of your benefits being processed in a timely manner. **Missed appointments and/or no-shows can result in non-receipt of retirement benefits and pay.** Remember this is **YOUR** retirement and we are here to assist you. It is our goal that you and your Family have a smooth transition into retirement. **If you have questions, please contact RSO at 804-734-6973/7345/6555.**



The Retirement Planning Timeline



2024 U.S. Army Retirement Planning Guide



36 months

- Gather resources
- Retire where?
- Retire when?
- Determine service providers
- Create major decision timeline
- Plan to work? School?
- Consider credentialing & internships
- Start transition savings fund

24-18 months

- Apply for retirement (between 12 and 24 months)*
- PCS move before retirement?
- Required service obligations?
- Retired pay estimate
- Attend Army TAP
- Attend Mandatory Retirement Planning Seminar



The U.S. Army official benefits website

12-6 months

- Apply for retirement (between 9 and 12 months)
- Pre-separation transition checklist
- Start active job search
- Finalize transition administrative absence & terminal leave plan
- Interview/post-retirement wardrobe purchases



18-12 months

- Medical/dental care catch up
- College applications?
- Start employment networking
- SBP and life insurance
- Investigate healthcare options

6 months to 1 month

- Retirement physical
- Survivor Benefit Plan election
- Change myPay email
- Schedule final move
- House-hunting
- BRS lump sum application
- Terminal leave & Administrative Absence
- Hand over job responsibilities
- Apply for VA disability compensation

Retirement month

(if not already done)

- Retirement ceremony
- Out processing/DD 214
- Get medical records
- HHG move
- Will/POA update

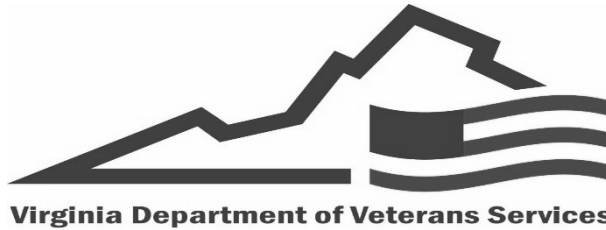
0-6 months after

- New ID cards
- Apply for TRICARE
- New job starts
- VGLI?
- CRSC?



Priority tasks indicated in red

*under pilot program allowing requests for voluntary AFS retirement up to 24 months out.



VA's Pre-Discharge Claim Checklist

Service members who are separating and plan to file for disability can file their claim before separation. This is done through the Veterans Affairs (VA) Benefits Delivery at Discharge (BDD) program. This program allows Service members to apply for VA disability compensation benefits prior to separation. Claims must be filed between 180 to 90 days prior to separation. This is a voluntary program, by choosing to participate in the BDD program, you are agreeing to meet the requirements of the program. The following checklist will help you compile the documents that you will need to file your claim (some may not apply to you).

- ___ Electronic copies of all military medical records is preferred, covering all active duty periods. NOTE: request your medical records 30-60 days in advance. (Official copy of Military Medical records are required to submit with your BDD claim.)
- ___ birth certificates for dependent children (if applicable)
- ___ Social security numbers for all dependents and spouse (if applicable)
- ___ Prior service DD214's and current Retirement/ETS orders - Required
- ___ All divorce decrees for spouse and self if currently married (if applicable)
- ___ Current Marriage license (if applicable)
- ___ Standard Form 1199a Direct Deposit (requires your bank to physically sign it)
- ___ Line of Duty and timeline regarding injuries (National Guard/Reserve) (if applicable)
- ___ A Separation Health Assessment - Part A Self-Assessment that can be downloaded from https://www.benefits.va.gov/compensation/dbg_publicdbgs.asp (Required)

PROCESS: Once you know your Release from Active Duty Date and have an official copy of your military medical records, schedule an appointment: <https://vesa.dvs.virginia.gov/>

Virginia Department of Veterans Services, Fort Lee Benefits Office

Soldier Support Center
1401 Barfoot Avenue
Building 3400,
Fort Lee, VA 23801

Room 120E/F

PH: (804)766-3478

BDD claims are time-sensitive, and you must submit your claim between 180 to 90 days prior to your release from active-duty date. Electronic copy of medical records is preferred so that we can review and submit your claim electronically.