



**JOINT READINESS
TRAINING CENTER
AND FORT POLK**



**PRERETIREMENT
GUIDE**

JANUARY 2006

FORT POLK, LOUISIANA 71459

Retirement Services Office
PRERETIREMENT GUIDE

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Prepared January 2006 by
Retirement Services Office
Fort Polk, LA

PRERETIREMENT GUIDE
CHECKLIST AND INFORMATION

The Adjutant General, Retirement Services Office (RSO) at Fort Polk prepared this Preretirement Guide to assist you in your retirement process.

1. Retirement checklist.

- a. Determine retirement date and contact your S1/PAC to submit retirement request. Request will be prepared and forwarded to the appropriate approval authority not earlier than 12 months or no later than 9 months before the requested retirement date or beginning date of transition leave, whichever is the earliest.
- b. Contact your Installation Retirement Services Officer (RSO) to arrange retirement and Survivor Benefit Plan (SBP) briefing no later than 120 days prior to transition leave and permissive TDY. Telephone # (337) 531-0402
- c. Complete DD Form 2656, Data for Payment of Retired Personnel and SBP election no later than 2 months prior to out-processing.
- d. Attend at least one PRERETIREMENT briefing prior to retirement.
- e. Contact your PAC for your initial Army Career Alumni Program (ACAP) appointment no earlier than 1 year from retirement date or no later than 90 days prior to final out-processing.
- f. Initiate retirement physical 4 months prior to final out-processing date. Telephone # (337) 531-2579
- g. Arrange appointment with SJA to update will and Power of Attorney. Telephone # (337) 531-2580
- h. Contact Transportation for HHG shipment 3 months prior to retirement (must have orders). Telephone # (337) 531-7098
- i. Schedule a pre-separation appointment with Transition Center, Telephone # (337) 531-7352, no later than 35 days prior to departure, bring retirement orders, DA 31 (leave form), and DA 137-1-R (leave verification form). This will begin the process for pick-up of clearance papers 30 days prior to departure from Fort Polk.
- j. Attend retirement ceremony.
- k. Complete VA Form 21-526, Veterans Application for Compensation or Pension, and turn in to the Transition Center at time of final clearance. The Transition Center will forward the application and the original medical and dental records to the VA facility.

l. Request a copy of your medical records for your personal files from the Patient Admin Correspondence Section at Bayne Jones Army Community Hospital. Allow 15 days for copies to be made.

m. If applicable complete DD Form 2860, Application for Combat-Related Special Compensation (CRSC).

n. Initiate action for retired ID cards.

o. Upon final clearing ensure you have in hand the certificate of release from active duty (DD Form 214).

2. Actions after retirement.

a. Notify Defense Finance and Accounting Service, US Military Retired Pay, P.O. Box 7130, London, KY 40742-7130, Phone: (800) 321-1080, upon change of address.

b. Submit claims for travel pay to home of selection to In/Out Processing Military Pay Branch (Travel), Defense Military Pay Office, 1787 23rd Street, Fort Polk, LA 71459-5510.

c. Safeguard your DD Form 214.

3. Finance and Accounting.

a. *Transition leave.* It is almost always more financially advantageous to sell back leave. However, soldiers may work while on transition leave, even for a federal agency. If leave in conjunction with retirement is taken so that the individual can accept employment, the benefits derived from the employment may far outweigh the small financial gain derived from selling back the leave.

b. *Temporary Disability Retired List-Permanent Disability Retirement List considerations.* When retiring for disability, the member may not have the option of taking transition leave. Consequently, those days in excess of the 60-day sell back limit may have to be forfeited.

c. *Payment of accrued leave.* Personnel entering active federal service on or after 11 February 1976 are entitled to be paid basic pay only for all unused accrued leave at the effective date of your retirement.

d. *Use of more than one privately owned conveyance (POC).* The use of more than one POC within the same household in connection with retirement may be authorized or approved as advantageous to the Government if:

(1) A member with dependents is authorized two privately owned vehicles; if eight or more dependents they are authorized three privately owned vehicles.

(2) Because of age or physical condition, special accommodations are needed to transport a family member in one vehicle and a second vehicle is required for travel of the other family members.

NOTE: PLEASE CHECK WITH THE FINANCE OFFICE, TRAVEL SECTION, BUILDING 1830 FOR ASSISTANCE. IT IS VERY IMPORTANT TO ENSURE THAT YOU MEET ALL THE REQUIREMENTS FOR USE OF MORE THAN ONE PRIVATELY OWNED CONVEYANCE.

e. *Travel allowances.*

(1) Payment of travel allowance to a place of your choice is as follows:

(a) \$.15 per mile for member.

(b) \$.02 per mile for one family member.

(c) \$.04 per mile for two family members, and \$.05 per mile for three or more family members.

(2) Per Diem rate is:

(a) \$99.00 per day for member.

(b) \$74.25 per day for each family member 12 years and over.

(c) \$49.50 per day for each family member under the age of 12.

(3) One day per diem is equal to 400 miles the first day and 350 miles per day thereafter of travel by POV.

(4) Send your travel claim settlement to: In/Out Processing Military Pay Branch (Travel), Defense Military Pay Office, 1787 23rd Street, Fort Polk, LA 71459-5510.

f. *DITY Move.* Retirees who are moving themselves to their designated place of retirement will forward a second Travel Voucher to the Director of Logistics, ATTN: Transportation Office, Fort Polk, Louisiana 71459 for settlement. It is mandatory that Soldiers attend a DITY move briefing at the Transportation Office before starting move. Be sure that you include with your travel voucher (DD Form 1351-2) the following documents which will be provided by your DITY counselor at the time of your briefing and that you indicate your state of legal residence on block 5:

(1) 1 copy of orders and all amendments.

(2) 1 copy of DD Form 2278.

(3) 1 empty weight ticket.

(4) 1 full weight ticket.

(5) WORKSHEET (all expenses for DITY move) Example: Truck rental, boxes, gas receipts, oil, and maintenance, etc.

NOTE:

1. It is advisable to make copies of the above documents in case the original copies are misplaced.
2. If you received advanced pay for your DITY move, attach a copy of DD Form 1351 to your DITY move claim.

4. Personal Property Shipment. You have one year after retirement to elect a retirement home and to have your personal property shipped at government expense. A move from government quarters to a local address is a courtesy move. This does not count as your retirement move. You may have the one-year period extended for schooling, medical, and other reasons; however, you must present evidence in advance to the Transportation Officer. You must apply for your extension early.

5. Casualty Assistance.

a. Upon the death of an Army retiree, the Casualty Office closest to the next of kin must be notified. To obtain the phone number of the Casualty Office closest to your residence, contact the Department of the Army Casualty Operations Center at (703) 325-7990. The Fort Polk Casualty Office telephone number is (337) 531-6316/7257 or toll-free (800) 626-3317.

b. Upon the death of an Army retiree, the next of kin must obtain a new identification card. His/her benefits remain the same, the identification card will identify the retiree as deceased rather than retired.

6. Retiree Benefits Summary.

a. *Burial in National Cemetery.* Eligible.

b. *Burial allowance payable by VA.* Limited to those eligible for VA pension or compensation. (Exception: Not eligible if allowance is paid by the Army or any military branch of service).

c. *Burial allowance payable by Social Security.* Limited to those who have a surviving spouse or surviving child eligible to draw social security benefits.

d. *Military Funeral*. Eligible.

e. *Payment of unpaid pay and allowances*. Eligible. Payable to designated beneficiary or by law.

f. *Payment by VA of Dependency and Indemnity Compensation (DIC)*. Eligible if death is due to service-connected cause.

g. *Payment by VA of Pension to Widow not entitled to DIC*. Subject to income limitations.

7. Medical Entitlements. You will be entitled to medical treatment at any active duty medical facility on a space available basis. You also will be authorized to utilize TRICARE with civilian doctors (who accept this insurance) until age 65. At age 65, you will be transferred to Medicare, then TRICARE For Life becomes the second payer.

8. Survivor Benefit Plan. The Survivor Benefit Plan (SBP) was established in 1972 by Public Law 92-425. It is designed to give you a way to continue part of your retired pay to your surviving spouse after you die. The SBP premium is not taxable to the retiree, but is taxable to the spouse upon receiving the annuity. The election must be made in writing before retirement with spouse's consent if you decline or elect a reduced base amount. Election is generally irreversible. The SBP annuity is determined by the base amount you elect. The base amount may range from a minimum of \$300 up to a maximum of full retired pay. The annuity is currently 55 percent of the base amount until age 62 and is 35 percent of the base amount if age 62 or older. Effective 1 April 2008, SBP will be a level 55 percent regardless of the annuitant's age. Public Law 108-375, dated 28 October 2004, phases in the post age 62 SBP annuity increase over 3 1/2 years.

9. Retired Pay. Army retired pay is processed by Defense Finance and Accounting Service-Cleveland Center (DFAS-CL), US Military Retirement Pay P.O. Box 7130, London, KY 40742-7130, toll-free, (800) 321-1080 (0800-1800 Eastern Time). Some basic facts you need to know are: You will NOT receive a monthly leave and earnings statement as you do now with active duty pay, but you will receive a notification whenever there is a change to your pay (e.g. you receive a Cost Of Living Adjustment (COLA), etc.). All soldiers who retire after 1 October 1990 are required to receive their monthly retired pay by the Direct Deposit or Electronic Fund Transfer method. This means your check will be sent directly to your financial institution. Checks will not be mailed to an individual's home or mailing address. The Direct Deposit method of payment is more efficient and timely and more convenient for the payee. Federal taxes (and state taxes, if requested) will be deducted from retired pay. Social Security/FICA taxes are NOT deducted from your retired pay.

10. List of Addresses and Phone Numbers. After you retire, the following addresses and phone numbers are provided to assist you.

RETIRED PAY MATTERS SHOULD BE ADDRESSED TO:

Defense Finance and Accounting Service TOLL FREE: (800) 321-1080
US Military Retirement Pay FAX: (800) 469-6559
P.O. Box 7130
London, KY 40742-7130

ANNUITANT PAY MATTERS SHOULD BE ADDRESSED TO:

US Military Annuitant Pay TOLL FREE: (800) 321-1080
P.O. Box 7130 FAX: (800) 982-8459
London, KY 40742-7131

SETTLEMENT OF TRAVEL CLAIMS:

In/Out Processing Military Pay Branch (Travel) DSN: 863-7083
Defense Military Pay Office COMMERCIAL: (337) 531-7083
1787 23rd Street
Fort Polk, LA 71459-5510

FINAL PAY SEPARATION:

Finance and Accounting Office DSN: 863-8638/9657/9663
Attention: Separation Branch COMMERCIAL: (337) 531-8638/9657/9663
Fort Polk, LA 71459