**PRE-RETIREMENT PROCESSING CHECKLIST (M-DAY)**

**Rank: \_\_\_\_\_\_ Last/First Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Unit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**TIME FRAME**

**Received your 20 Year Notification of Eligibility (20 Year Letter)**

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| \_\_\_\_\_ | 1. | 20 YEAR NOTIFICATION OF ELIGIBILITY (20 YEAR LETTER). POC: G1 RSO to iPERMS and also emailed to soldiers record on file.  Upon receipt of your 20 Year Letter, you have several choices to make: (1) continue serving in the Army National Guard, (2) transfer to the Retired Reserves as a “Grey Area Retiree”, (3) transfer to the Individual Ready Reserves (IRR) \*\*\*\*Continuation in an active status after receipt of the 20 Year Letter ***requires*** that you earn at least 50 points on each Anniversary Year Ending (AYE). |
| \_\_\_\_\_ | 2. | SURVIVOR BENEFIT PLAN (SBP). POC: Retirement Service Office or State RPAM section. Upon being notified that you qualify for Reserve retired pay, and before reaching the age of 60, you are eligible to enroll in SBP. You are required by law to elect coverage during the 90 day period beginning the day you receive your 20 year letter packet. Those who receive their packet and do not reply within the 90 days will be automatically enrolled, by law, for the maximum coverage of spouse and children UNLESS the Soldier and spouse reply back to State Headquarters within 90 days of receipt of their 20 year letter stating they do not want SPB coverage. |

**12 to 6 months prior to retirement**

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| \_\_\_\_\_ | 3. | SUBMIT APPLICATION (MEMORANDUM) FOR RETIREMENT. (**MANDATORY**)  POC: Readiness NCO or PSNCO. They will assist you in preparing and processing your packet. Make sure that the DA 4187 provided indicates the effective date and if you want to be transferred into the Retired Reserves, the Individual Ready Reserve (IRR) or Discharged. If you choose “discharge”, you MUST be counseled by the next O5 in your chain of command and have that form attached to your 4187. | |
| \_\_\_\_\_ | 4. | REVIEW YOUR RECORDS IN iPERMS, Soldier Record Board (SRB) or Officer Record Brief (ORB), DD214 and Awards.  POC: Readiness NCO or PSNCO. Supporting documentation is required for any updates. | |
| \_\_\_\_\_ | 5. | REVIEW YOU RPAM STATEMENT (NGB23B). POC: Readiness NCO or PSNCO.  It is highly encourage to review your RPAM statement annually rather than on your last day. Provide the unit with the following documentation: DD 214s, old NGB Form 23B, DA Form 1379s, LESs/MMPAs, proof of completed correspondence courses prior to 15 April 2016. Verify if you are eligible for Reduce Retirement Age. | |
| \_\_\_\_\_ | 6. | VERIFY REDUCED RETIREMENT AGE. POC Readiness NCO or PSNCO.  Soldiers who were called under authority of 10 USC 12301 (d) and 12302 on or after 29 January 2008 are entitled to claim a 90 day drop from their age 60 retirement date for every 90 days accumulated in any given fiscal year. Supporting documentation includes DD 214s and mobilization orders. All requests must forwarded to the RPAM section at: [ng.ut.utarng.mbx.retirement@army.mil](mailto:ng.ut.utarng.mbx.retirement@army.mil) | |
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| \_\_\_\_\_ | 7. | CREATE DS LOGON. DSL makes it easy to access your information (without a CAC) contained across DoD and VA partner websites. By signing up for a free account, you can view your financial and benefits information; Personally Identifiable Information (PII); Personal Health Information (PHI); claim statuses and records. Examples are VA.gov, My HealtheVet, eBenefits, myarmybenefits.com and HRCAPPS (iPERMS records). |

**6 months prior to retirement**

\_\_\_\_\_ 8. ATTEND TRANSITION SEMINARS. (Draper Office and on TEAMS) POC: Retirement Services Office. Requests for attendance should be coordinated through unit and MSC. The briefings discuss benefits and entitlements eligibilities, Survival Benefits Program, How to read your RPAM Statement, Veteran Benefits, Tri-Care and Tri-Care Dental, Reduced Retirement Age, and more. Briefings are held on the 3rd Wednesday of each month. Attendance at Transition orientation is highly recommended. *Spouses are highly encouraged to attend.*

\_\_\_\_\_ 9. FINALIZE ANY PENDING MEDICAL ACTIONS OR LINE OF DUTY (LOD) DETERMINATIONS. POC: Readiness or Medical NCO. Ensure that all medical issues are documented in your medical records and that you have initiated an LOD for all service related injuries. LOD’s can continue to process after your retirement. Ensure that you provide medical documentation to your unit. Also, utilize your final PHA to ensure everything is recorded. Let the medical personnel at the PHA know that you intend to retire that year.

\*NOTE: Medical/dental records are the official property of the Army. If you desire copies of important documents, ask the Case Manager to make copies after your physical is completed. You may check out your dental records to copy those documents if you desire.\* *(It is highly recommended that you make copies of your medical and dental records and request your unit to retrieve copies of your documents from Health Records Repository (HRR)).*

\_\_\_\_\_ 10. SCHEDULE VETERAN AFFAIRS APPOINTMENTS. POC: Nearest VA Office.

During the monthly retirement briefings you will have access to a SME, with the VA, that can give you numbers/contacts to multiple VSO’s in order to apply for VA benefits, as well as the Utah Department of Veterans Affairs.

**4 months prior to retirement**

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| \_\_\_\_\_ | 11. | REVIEW AND UPDATE LIFE INSURANCE POLICIES.  Consider Veterans Group Life Insurance. \*VGLI -You must apply within one year and 120 days from discharge.  However, Service members who submit their application within 120 days of discharge do not need to submit evidence of good health.  *Service members who apply after the 120-day period must submit evidence of good health. (*<http://www.insurance.va.gov/sglisite/vgli/vgli.htm>) |

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| **90 to 30 days prior** | | |
| \_\_\_\_\_ | 12. | PERSONNEL RECORD REVIEW. POC: Readiness NCO.  \_\_\_\_\_\_\_ Verify all prior service Statement of Service, using DD 214s, NGB Form 22s, etc. \_\_\_\_\_\_\_ Update all Federal and State awards on ORB/ERB.  \_\_\_\_\_\_\_ Update SGLI/SOES; information will be valid for 120 days past retirement date.  \_\_\_\_\_\_\_ Update DD 93 with S-1. Information will be valid for 120 days past retirement date. |
| \_\_\_\_\_ | 13. | SUPPLY CLEARANCE. POC: Supply Sergeant.  \_\_\_\_\_\_\_ Turn in all assigned equipment and clothing.  \_\_\_\_\_\_\_ Pull clothing record from AKO account.  \_\_\_\_\_\_\_ Once cleared supply; turn in your supply clearance sheet to the unit Readiness NCO. |
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| \_\_\_\_\_  \_\_\_\_\_ | 14.  15. | NOTIFY YOUR UNIT IF YOU DESIRE TO PARTICIPATE IN A RETIREMENT CEREMONY. POC: Readiness NCO.  All retiring or retired Soldiers, all officers, warrant officers and enlisted are encouraged to participate.  SECURITY: POC: Security Manager / Special Security Officer (if indoctrinated for sensitive compartmented information). Obtain Security Termination Briefing, debrief appropriate accesses in DISS JVS, turn in badges and keys, reset combinations. |
| **Last drill day** | | |
| \_\_\_\_\_ | 16. | SIGN OUT OF UNIT. **(MANDATORY)**. POC: Readiness NCO or PSNCO.  NOTE: You now have the ability to sign up for the Gray Area Retirement MyPay account at DFAS (<https://www.dfas.mil/RetiredMilitary/plan/Gray-Area-Retirees/>) which allows you a new avenue to stay connected and informed between the time you stop drilling and the time you start receiving retired pay. |
| \_\_\_\_\_ | 17. | MAKE AN APPOINTMENT WITH DEERS. You will need to turn in your current CAC and receive your new gray area card. This card will have an expiration date set the day before your 60th birthday. |

**Retired Pay Process**

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| \_\_\_\_\_ | 18. | AGE 59. POC: Retirement Service Office.  Contact your state retirement service office on your 59th birthday to request your retirement application. You should return the packet nine months, to a year, prior to your 60th birthday. You are responsible for providing a current mailing address. Once the application is reviewed it will be forwarded HRC-Fort Knox for processing.  NOTE: Soldiers who were called under authority of 10 USC 12301 (d) and 12302 on or after 29 January 2008 are entitled to claim a 90 day drop from their age 60 retirement date for every 90 days accumulated in any given fiscal year. Refer to the retirement SOP for additional USC codes authorized. Soldiers who claim this qualification should request the adjustment on the RPAM statement via their unit prior to retirement. Valid supporting documentations mobilization order(s) and DD 214(s). The state retirement service office will verify if you qualify and will take the necessary action. |
| \_\_\_\_\_ | 19. | AGE 60. POC: Retirement Service Office and DEERS Office.  Contact your Retirement Service Officer Mr. Frank LaBare at 801.432.4550 or via email at [frank.w.labare.civ@army.mil](mailto:frank.w.labare.civ@army.mil) - and local DEERS office to update your ID card for yourself and spouse. Turn in your “expired” GAR card for your new Indefinite retired card. UPDATE TRICARE - POC: Call your local Tri-Care office for rates.  **ENJOY YOUR RETIREMENT AND THANK YOU FOR YOUR SERVICE**  **Retirement Service Distro:**  **- email:** [**ng.ut.utarng.mbx.retirement@army.mil**](mailto:ng.ut.utarng.mbx.retirement@army.mil)  **Retirement Service Officer:**  **Mr. Frank LaBare**  **- phone: 801.432.4550**  **- email: frank.w.labare.civ@army.mil** |
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