DECEDENT AFFAIRS CHECKLIST

Formerly referred to as the REPORT OF DEATH (ROD) Checklist

Revised: 05-Dec-22

CHECKLIST and ADDITIONAL DETAILS--Review this basic CHECKLIST and the ADDITIONAL DETAILS pages with caller or walk-in person reporting death. Provide a copy to the walk-in person or have a copy of this checklist with all pages mailed to the caller. Please make sure the client knows that these pages are not all inclusive. Their personal situation may necessitate many more contacts.

Note – RAO Daily Log Instructions:

--When a spouse or family member reports the **DEATH of a RETIREE (or SBP ANNUITANT)** to the RAO office or as a courtesy call (such as in response to a RAO Condolence Card), make entry note of contact in the RAO Daily Log. If the caller or walk-in has already notified Defense Finance and Accounting Service (DFAS) of the death, also make note of that DFAS contact in the Log.

- Notify **Defense Finance and Accounting Service (DFAS)** to report death at **1-800-321-1080.** See ADDITIONAL DETAILS sheet items 1, 7, 8, & 9.
- Notify **Social Security Administration (SSA)** to report death at **1-800-772-1213.** See ADDITIONAL DETAILS sheet item 2.
- Notify **Department of Veterans Affairs (VA)** to report death at **1-800-827-1000** if retiree was receiving disability compensation. See ADDITIONAL DETAILS sheet item 3.
- Notify **Defense Enrollment Eligibility Reporting System (DEERS)** to report a death at **1-800-538-9552.** This can also be accomplished at the ID Card issuing facility when applying for a new card. See ADDITIONAL DETAILS sheet item 4.
- Contact a convenient **Identification Card Issuing Facility** to replace ID Cards. Online scheduling website is https://idco.dmdc.osd.mil/idco. See ADDITIONAL DETAILS sheet item 4.
- Notify **Office of Personnel Management (OPM)** to report a death at **1-888-767-6738** if military retiree was retired from or still employed in the Civil Service or Federal Employment system. See ADDITIONAL DETAILS sheet item 5.
- Any special requirements such as **Military Honors** at funeral or **Burial-At-Sea?** See ADDITIONAL DETAILS sheet item 6.
- Follow-on items such as **Vehicle Registration**, transfer of **Bank Accounts, Credit Cards**, commercial **Insurance Policies**, etc. See ADDITIONAL DETAILS sheet item 6.

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ADDITIONAL DETAILS-DECEDENT AFFAIRS CHECKLIST

Information Sheet(provide copy to walk-ins, mail to callers)

1. Defense Finance and Accounting Service (DFAS) must be notified as soon as possible by calling toll free **800-321-1080** from anywhere in the United States. It is important to have the **retiree's full name, Social Security number,** and **date of death** when you call.

Notification can also be made by going online at: http://www.dfas.mil/retiredmilitary/survivors/retiree-death.html.

If the retiree, spouse, or annuitant passes away at Tripler Army Medical Center, the Decedent Affairs office at Tripler will notify the appropriate Defense Finance and Accounting Service (DFAS) office.

If overseas and unsuccessful contacting the 800 number, try the commercial number 317-212-0551 and select from the phone tree until able to be directed to an appropriate representative.

Retired pay ceases upon the death of a retiree. Upon notification, DFAS will begin to close out the retiree's pay account to prevent any overpayments. Tardiness in reporting the death could result in **overpayment** of the retiree's retired pay **which will be collected back by DFAS.** Additional information is available at: www.dfas.mil/retiredmilitary/survivors/retiree-death.html.

Also, DFAS needs to be notified of the passing of a Survivor Benefit Plan (SBP) annuity recipient as expeditiously as possible. The same rules for recoupment of overpayments after the date of death also apply.

2. Social Security Administration (SSA) must be notified at **800-772-1213** to report the retiree's or spouse's death and apply for survivor's benefits and other benefits such as application for partial burial expenses and other benefits as eligible. A Funeral Director can assist in notifying Social Security of the death but the surviving spouse should call to make an appointment for survivor's benefits and such.

---If **NOT currently getting SS benefits**: Ensure the **retiree's death is reported PROMPTLY** by telephone and schedule an appointment to apply for survivors benefits. In some cases, benefits will be paid from the date of notification, not from the date of retiree's death. The SSA will tell you **what documents are needed** to bring to the appointment but the following list may help:

- Death Certificate
- Social Security Card of surviving spouse
- Birth Certificate/Naturalization Certificate
- Marriage Certificate
- Divorce Papers; if applying as a divorced widow or widower
- Dependent Children's Social Security Cards(numbers if available) and Birth Certificates

- Deceased worker's W-2 form(s) and/or federal self-employment tax return for the most recent year, and
- Name of your bank, bank routing number, account number, and voided check to set-up Direct Deposit.

---**If ALREADY getting SS benefits:** If benefits are based on your **or** spouses' work, when the death is reported SSA will change payments to any higher amount you may be entitled to. Call and make an appointment to bring in any additional required documents such as described above.

3. Department of Veterans Affairs (VA) must be notified at **800-827-1000** to report the retiree's death if the retiree was receiving any disability compensation. As with military retired pay this ceases upon the death of the retiree and overpayments will be collected. **And:**

- To find out procedures for the surviving spouse to claim unpaid disability compensation due the deceased.

- To find out if the survivor is entitled to **Dependency and Indemnity Compensation (DIC)** in the event the deceased had a service connected disability, and

- Any other benefits based on the death of the retiree including burial benefits.

---Also Contact the **VA** at **800-669-8477** for retirees enrolled in a **VA disability life insurance policy** or other sponsored life insurance policies such as **National Service Life Insurance (NSLI).**

---Or contact the **Office of Serviceman's Group Life Insurance (OSGLI)** at **800-419-1473** for retirees enrolled in **Veterans Group Life Insurance (VGLI).**

4. Defense Enrollment Eligibility Reporting System (DEERS) must be notified at **800-538-9552** of the retiree's (or spouse's) death. At this event the surviving spouse is now his or her own sponsor for military benefits, no longer the deceased retiree (for Tricare, exchange, commissary, MWR, etc.). Since the surviving spouse must also obtain a new Identification Card, updating DEERS can accomplished at that time. Access and make an appointment at your nearest ID card issuing facility by going to https://idco.dmdc.osd.mil/idco.

AT THIS REVISION MASKS ARE NOT REQUIRED AT ID CARD FACILITIES BUT: for current information call Moanalua Navy Service Center at 808-471-2405, Hickam Military Personnel Flight at 808-449-0846, Hilo AG/ARNG at 808-844-6601/6607, Kahului AG/ANG at 808-789-0637, PMRF Barking Sands at 808-335-4493, or other Oahu sites identified in the ID Card Office-RAPIDS scheduler website listed above.

If you want to wear a mask for your personal health concerns, by all means do so.

5. Office of Personnel Management (OPM) must be notified at **888-767-6738** if the military retiree (or the spouse) was also a retired Federal civilian employee or currently a Federal civilian employee at the time of death. If such, the military retiree or spouse may be enrolled in OPM's survivor benefit plan, life insurance, and/or Thrift Savings Plan.

A mailing address is: Office of Personnel Management, Retirement Operations Center, PO Box 45, Boyers, PA 16017. An alternate phone number for information is 1-724-794-8690.

6. Notification must also be made (this list is not to be considered complete):

- To **financial institutions** including all **investment activities** and **credit card issuers**. Credit card accounts should be reviewed closely and cancelled/cards destroyed if appropriate. Transfer upon death account agreements should be activated after any necessary repayments to DFAS and the VA are accomplished.

- To **Will Executor** (if whichever surviving spouse is not so designated) and others assisting as appropriate. Any activity involving or requiring probate must be recognized in the will and disposition dealt with. Ownership and type of ownership of real property (land and houses) and how the ownership would pass upon death should be dealt with before the death of the retiree or spouse.

- To all **commercial insurance companies** for policies in effect including life, home, health, renters, vehicle, etc., and to claim life insurance benefits.

- To the state department of **vehicle registration** for autos, boats, trailers, etc., to change names on titles.

- To all membership **organizations** and periodical **subscriptions** to cancel or change names as appropriate.

---**The Funeral Director** can make requests for **military honors** for the veteran at the burial and a United States flag from the VA (see the VA section above).

To be sure of local military honors:

- **Navy Personnel Command**, Millington, TN, phone number for **burial honors** is **877-645-4667**. The **local Navy (Pearl Harbor)** phone number for **burial honors** is **808-473-4512**.

- For **Air Force assistance** contact Casualty Assistance Services at **Hickam Field** at **808-449-0310 / 0303**.

- **Navy and Marine Corps Mortuary Affairs office**, Millington, TN, **phone number for burial at sea arrangements is 866-787-0081**. For **local burial at sea** arrangements, contact the Honolulu Coordinator, Navy Liaison Unit, Tripler Army Medical Center at **808-433-4709**.

The director will also order the death certificates from the appropriate state agency-in Hawaii it is the Department of Health.

7. **Required forms after the passing of the retiree or spouse:**

- **DD Form 214**: for all burial benefits -- the VA will want copies including burial of the spouse in a National Cemetery such as the Punchbowl where the retiree (veteran) is or will also be interred.

- **Death Certificate** certified by the state issuing authority (Health Department here in Hawaii). DFAS, VA, Social Security, VGLI, other insurance policies, financial activities, etc., will all want certified copies. Suggest order at least 20.

- **Social Security card** (copy) may be requested for social security and SBP annuitant applicants and Arrears of Pay applicant.

8. **Processing of DFAS forms after report of retiree's death:**

- Within two weeks after reporting the death of a retiree to DFAS, DFAS will send to the surviving spouse (or designated beneficiary) a condolence letter and possibly packages including forms and instructions for **claiming unpaid pay due the deceased retiree (Arrears of Pay)** and, if the surviving spouse was enrolled in the **Survivor Benefit Plan (SBP)**, forms and instructions for **applying for the SBP annuity**. The military retiree's Retiree Account Statement (RAS) (discussed in the following section) will identify the beneficiaries for such.

- The surviving spouse would complete the forms and return them according to the instructions enclosed with the forms with a certified copy of the death certificate and, if requested, a copy of the spouse's Social Security card.

- If assistance is needed completing the forms, the **DFAS call center** at **800-321-1080** can help.

9. **A FINAL ITEM OF INFORMATION: The "Retiree Account Statement (RAS)"**

- A "Retiree Account Statement" **(RAS)** (mentioned above) from the Defense Finance and Accounting Service (DFAS) is prepared and available monthly to each retiree electronically (online via ***myPay*** account) **and by mail (if not stopped) only as changes to retired pay occur (usually in December for the forthcoming year).** Changes include COLA, tax withholding, survivor benefit plan deductions, allotments for VGLI / Tricare / FEDVIP dental and/or vision / etc., and any court ordered deductions just to name a few. A detailed example of the RAS is included on pages 9 and 10.

- **A generic example copy of the RAS, front and back, is included on pages 9 and 10.** This example was originally provided to all via DFAS newsletter. Please note that the PAY ITEM DESCRIPTION section in the block below the retiree's mailing address will show both the old pay related items such as base pay, SBP payments, tax withholdings, allotments, etc., and the new amounts. The unchanged monthly RAS statement is available online only and can be accessed via your ***myPay*** account.

- The bottom front block of the RAS statement indicates among other things that a **Survivor Benefit Plan (SBP) or Former Spouse Survivor Benefit Plan (FSSBP)** is in effect, the birth date of the beneficiary, the base amount the annuity is based on, and the annuity to be paid in the event of the death of the retiree.

- The reverse of the Retiree Account Statement has a block indicating the person designated as the beneficiary for **unpaid pay (referred to as Arrears of Pay)** upon the death of the retiree. There are also blocks for listing allotments, Former Spouse Protection Act deductions, etc. as they pertain. And a message section detailing COLA data and other updates or information. Make sure to check all these items out.

- **Finally**: Form 1099R for the preceding calendar year's retired pay is also available annually by the end of each December electronically (online via ***myPay*** account) and by mail (if not stopped by the retiree).

Remember, the Retired Activities Office (RAO) at the Military and Family Support Center (MFSC) is here to provide assistance to our retired military community. We have helped many fill out the DFAS forms and answer questions on varying subjects that retirees have posed. If our RAO volunteers do not know the answer we will find it or let you know where you can get the answer directly.

The telephone number for the Retired Activities Office is 808-474-0032. Retirees and family members can also submit comments, questions and requests for assistance through the Military and Family Support Center (MFSC) website: MFSCHawaii@navy.mil. The site is monitored daily by MFSC staff.

EVEN AS THE COVID-19 PANDEMIC APPEARS TO BE RECEEDING, THE OFFICE IS STILL ONLY OPEN ON A LIMITED BASIS FOR WALK-IN MEETINGS. FOR ALL QUESTIONS AND ASSISTANCE AND/OR IF AN OFFICE MEETING IS NEEDED, PLEASE LEAVE PHONE MAIL MESSAGES AT THE OFFICE TELEPHONE NUMBER AT 808-474-0032 OR THE MFSC MAIN RECEPTION COUNTER AT 808-474-1999 OR SEND MESSAGES TO THE MFSC WEBSITE MFSCHawaii@navy.mil. WE WILL RESPOND AS SOON AS WE CAN.

Revised: 05-Dec-22

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Understanding Your Retiree Account Statement (RAS) -- Page 1

Your Retiree Account Statement (RAS) is a two-page document issued by Defense finance and Accounting Service (DFAS) that summarizes your pay, benefits and deductions at a specific point in time. It is a descript on of what you can expect on the next pay date. Understanding your RAS is an important first step in managing your retirement pay. Every statement will not contain all of the below items – only those that apply to your pay at the time the RAS is issued.

The top section of page 1 lists your personal information such as name, Social security number (last 4 digits), and address, as well as the statement dates.

The **PAY ITEM DESCRIPTION** lists pay information for the month. If your pay has changed since your last RAS, it will show the previous amount as well as the amount being applied to your current pay.

RETIREE ACCOUNT STATEMENT

STATEMENT EFFECTIVE DATE	NEW PAY DUE AS OF	SSN

PLEASE REMEMBER TO NOTIFY DFAS IF YOUR ADDRESS CHANGES

Your mailing address

DFAS-CL POINTS OF CONTACT

Defense Finance and Accounting Service
US Military Retirement Pay
8899 E 56th Street
Indianapolis, IN 46249-1200

COMMERCIAL 317-212-0551
TOLL FREE 1-800-321-1080
TOLL FREE FAX 1-800-469-6559

myPay
https://myPay.dfas.mil

PAY ITEM DESCRIPTION

ITEM	OLD / NEW	ITEM	OLD / NEW
GROSS PAY	Total pay before taxes, deductions and credits	SITW	Amount withheld for state taxes
TOTAL INCOME	Amount subject to federal taxes	ALLOTMENTS	Total you've allotted for other payments
MISC. CREDIT	Special payment or refund	TAX LEVY	Payments to IRS for back taxes
VA WAIVER	Amount of VA award deducted from your gross pay	GARNISHMENT	Court-ordered payments
SBP COSTS	Amount deducted for SBP premium	FORMER SPOUSE	Court-ordered payments to former spouse
FITW	Amount withheld for federal taxes	MISC DEDUCTIONS	Interest and other special deductions
ADDITIONAL FITW	Additional taxes you wanted withheld	NET PAY	Total pay

PAYMENT ADDRESS

Shows where your monthly pay is sent. If you have direct deposit, this box will list the name and address of your bank or other financial institution.

YEAR TO DATE SUMMARY (FOR INFORMATION ONLY)

TAXABLE INCOME:
FEDERAL INCOME TAX WITHHELD:
STATE TAX WITHHELD

Shows your total taxable income, as well as the federal and state income tax withholdings as of the statement date.

TAXES

FEDERAL WITHHOLDING STATUS:	Married or Single	STATE CODE:	State for which taxes are being withheld
TOTAL EXEMPTIONS:	# exemptions you declared	STATE INCOME TAX WITHHELD:	Amount withheld this pay period
FEDERAL INCOME TAX WITHHELD:	Amount withheld this pay period		

SURVIVOR BENEFIT PLAN (SBP) COVERAGE

This area lists information about your decisions regarding SBP coverage:

TYPE OF COVERAGE	Describes whether you have declined SBP coverage, have no eligible beneficiary or have elected to include your spouse and/or children, former spouse and/or children, etc.
COST	Your monthly SBP premium. This will include the Reserve Component SBP cost if applicable.
ANNUITY BASE AMOUNT	The total amount to be used in calculating your SBP beneficiary's annuity.
DATE OF BIRTH	Birth date of your primary SBP beneficiary and/or the youngest child listed as an SBP beneficiary.
NOTES	Lists the number of months of SBP premiums you have paid towards the 360-month Paid-Up SBP total.

RETIRED SERVICEMAN FAMILY PROTECTION PLAN (RSFPP) COVERAGE

RSFPP COVERAGE TYPE | ANNUITY PAYABLE | RSFPP COST

This area lists information about your decisions regarding RSFPP coverage including coverage type and your monthly premium amount.

DFAS-CL 7220/148 (Rev 03-01)

Source: https://dfas.mil/retiredmilitary/manage/ras/understandpage1.html

Understanding your RAS - Page 2

A monthly electronic Retiree Account Statement (eRAS) is available to all military retirees currently receiving retirement payments but is only available on myPay. The statements are available by the first of each month and you can access up to 12 months of them.

Unless you have terminated paper statements, they are mailed whenever there is a change to anything in your account and an annual RAS each December reflecting the amounts to start the new year.

Source: https://www.dfas.mil/retiredmilitary/managerras.html

ALLOTMENTS AND BONDS

ALLOTMENT TYPE	PAYEE	AMOUNT	BOND FACE VALUE	SERIES	DEDUCTION

This area lists all of your active allotments, including payee names and monthly allotment amounts. U.S. Savings Bond allotments are no longer available.

TAX LEVY DEDUCTIONS

DATE OF LEVY	MONTHLY AMOUNT	BALANCE

If the IRS serves DFAS a levy because you owe taxes, you'll find the date of the levy, the monthly amount deducted from your retired pay, and the balance remaining in this area.

GARNISHMENT DEDUCTIONS

PAYEE	GARNISHMENT AMOUNT	COMPLETION DATE

This box lists the recipient of any garnishment of your pay, the monthly amount being deducted, and the date the garnishment will no longer be deducted from your pay.

FORMER SPOUSE PROTECTION ACT DEDUCTIONS

PAYEE	AMOUNT

This area lists the recipient of the funds, as well as the monthly amount being deducted from your pay.

MISCELLANEOUS DEBTS

DEBT TYPE	MONTHLY DEDUCTION	PRINCIPAL AMOUNT	INTEREST AMOUNT	ACCUMULATED INTEREST	DEBT BALANCE

Lists the debt type and monthly deduction amount of debts being collected from your retired pay by DFAS. Also includes the principle amount of the debt, accumulated interest and the remaining balance of the debt.

ARREARS OF PAY BENEFICIARY INFORMATION

YOU HAVE ELECTED ORDER OF PRECEDENCE

NAME	SHARE	RELATIONSHIP

Lists the person or persons you designated to receive your final retired pay entitlement.

MESSAGE SECTION

This area may contain a variety of updates and alerts. Examples include annual Cost of Living Adjustment (COLA) information, requests for information missing from your account, helpful hints, etc.

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Source: https://dfas.mil/retiredmilitary/manage/ras/understandpage2.html