



AUGUST 13, 2025

LEGACY PLANNING

CONSIDERATIONS FOR END OF LIFE

RETIREMENT SERVICES
IDAHO NATIONAL GUARD
4250 W Cessna St, Bldg. 270, Gowen Field, Boise, ID, 83705

NOTE: This document was put together to consolidate the information about what to do when a service member passes. While all effort is made to ensure this information is correct, this information is provided as a courtesy only, agencies update their policies & forms at irregular intervals. It is incumbent for you to verify that the information has not changed and is current. Retirement Services of the Idaho National Guard does not bear responsibility for the accuracy of this information.

Even in death, military members receive benefits. Designated beneficiaries may receive one time or continual benefits based on eligibility requirements. For those not familiar with death benefits it can be confusing what a deceased service member is entitled to. To assist the family in ensuring the many departments, organizations, or other government (and civilian) entities are notified is why this document was put together. It starts while the service member is alive, as this is the easiest way to get information, or supporting documents to apply for benefits. It then goes through the process of what families need to know when closing out the service member's career. This document is not all encompassing, every individual's situation is different

The information presented here is to give spouses, dependents, and other personnel the basic requirements to handle the affairs of a deceased service member. This planner is set up with two checklists, one to be talked through with the service member, and a *Checklist* of who needs to be notified. This is followed by a section for each category with details that goes into a little more detail of paperwork requirements and potential questions that will be asked of the person reporting the death. Finally, the *Contact Information* section with numbers, websites, and mailing addresses, is found in Annex A on page 39.

If you have questions, you can reach Retirement Services at

Phone: 208.272.3815

In Person / Mail

4250 W. Cessna St. Bldg 270 Gowen Field
Boise, ID. 83705

For the current version of this guide please visit: <https://www.imd.idaho.gov/resource-page/> or scan the QR code:



Table of Contents

	Page
Checklist	
End of Life Planning	3
Who to notify when Service Member is Deceased	4
Requesting additional Death Certificates	8
Defense Finance and Accounting Service (DFAS)	10
How to report the death of a service member to DFAS	10
Survivor Benefit Plan	13
Veterans Affairs (VA)	15
Veteran Service Officer (VSO)	15
How to report the death of a service member to VA	17
Burial Benefits Allowance	18
Dependency and Indemnity Compensation (DIC)	21
Survivors Pension	23
Aid and Attendance or Housebound Allowance	26
Secondary Dependency	27
Social Security Administration (SSA)	27
Internal Revenue Service (IRS)	32
Federal Employee Benefits	33
Defense Enrollment Eligibility Reporting System (DEERS)/ID Cards	34
BENEFEDS	34
Express Scripts (TRICARE)	34
U.S. Passports	35
State Social Services/Benefits	35
Voter Registration	35
TRICARE – TRICARE for Life	35
Funeral Honors	38

Annex

A - Contact Information List	39
B - askDFAS Tools for Retirees	43
C - askDFAS Tools for Annuitants	47
D - Military Records Request	51
E - Military Awards and Decorations Request	54
F - Forms (with links to download)	59
G - Veteran Service Organizations	60
H - References	61

Checklist for end-of-life planning.

The following information should be stored in a secure location, preferably fire and water resistant, with the location known to Spouse, Children, or Executor.

- Pre-register at Veterans Cemetery. Place pre-authorization with other documents.
- Other considerations
 - Will – or copy of.
 - Share locations for important paperwork (see section below for ideas of paperwork).
 - Document all your accounts and the usernames and passwords.
 - Make a list of who needs to be told (and any health concerns about being notified).
 - Make arrangements with funeral home.
 - Communicate your funeral wishes.
 - Arrange a home for your pet(s).
 - Write Obituary / Death Notice.
 - List of civilian employers that are/may provide benefits. i.e. service member worked for company 'X' and has 401k, life insurance or other benefits that would transfer to family. Recommend documenting contact information for HRO point of contact.
 - Ensure spouse has access to military sites – milConnect, TriWest, DFAS

Checklist for families of deceased service members.

Report the death of a veteran to:

Within 24-72 hours:

- Coroner/Medical Examiner – request that any service-connected disabilities that might be a contributing factor in service member’s death. Have them annotate on Death Certificate.
- Funeral Home to gather/receive service member and prepare in accordance with their wishes.
- Veteran Cemetery – notify if pre-registered or start registration.

Within five business days:

- [Defense Finance and Accounting Service \(DFAS\)](#) – stop retirement, [apply for SBP](#) (if applicable).
- Veteran’s Affairs – [stop disability](#), [apply for Dependency and Indemnity Compensation \(DIC\)](#), determine eligibility for [Survivors Pension](#), Aid and Attendance, and Housebound.
- Social Security Administration – [stop Social Security Benefits](#), ask [who can receive Survivor Benefits](#), [apply for Social Security Survivor Benefits](#). This also notifies MEDICARE.
- Internal Revenue Service (IRS).
- Federal Employee Benefits (if applicable).
- Defense Enrollment Eligibility Reporting System (DEERS). Update status at DEERS (ID Card). This also notifies Defense Manpower Data Center (DMDC) and cancels service member’s medical coverage (TRICARE/TRICARE for Life).
- BENEFEDS to inform of change in status and make spouse the sponsor of insurance.
- Other retirement/pension providing organizations.
- Life Insurance.
- State Social Services/Benefits.
- Civilian employment benefits.

Notify as you can:

- Express Scripts to cancel any medications for service member.
- Financial Institutions (Banks, Investment Companies, Credit Cards, Credit Bureaus – request credit freeze for deceased service member).
- Department of Motor Vehicles.
- Voter Registration.
- Utilities in veteran’s name.
- Memberships / subscriptions.

Note: Contact information can be found in the appropriate section or in the *Annex A: Contact Information List* at the back of the Legacy Planner.

Items to consider while a veteran is available:

- **Pre-register at Veterans Cemetery.**

National cemeteries are operated by the U.S. Department of Veterans Affairs, while state cemeteries, though sometimes established or improved through national government funds, are operated by the state government. The current cemeteries in Idaho:

- Idaho State Veterans Cemetery – Boise

- <https://Veterans.idaho.gov/cemeteries/boise-cemetery/>

- 10100 N Horseshoe Bend Rd, Boise, ID 83714

- 208.780.1340

- Idaho State Veterans Cemetery – Blackfoot

- <https://Veterans.idaho.gov/cemeteries/cemetery-blackfoot/>

- 2651 Cromwell Ln, Blackfoot, ID 83221

- 208.701.7161

- Snake River Canyon National Cemetery – Buhl

- <https://www.cem.va.gov/cems/nchp/snakerivercanyon.asp>

- 1585 East Elm St (E 4150 N), Buhl, ID, 83316

- 208.732.7499 or 503.273.5250

Forms required:

For Idaho State Veterans Cemeteries

- Pre-Registration Application - <https://Veterans.idaho.gov/pressrelease/pre-registration-application/>
- Copy of DD 214
- Copy of Marriage Certificate
- Marker Inscription Request - <https://Veterans.idaho.gov/wp-content/uploads/2024/01/Marker-Inscription-Request-2024-Fillable-Form.pdf>

For National Cemeteries

- VA Form 40-10007 (Application for Pre-Need Determination of Eligibility for Burial in a VA National Cemetery), **OR**
<https://www.va.gov/burials-and-memorials/pre-need/form-10007-apply-for-eligibility/introduction>

How to request Military Service records

<https://Veterans.idaho.gov/wp-content/uploads/2024/02/Military-Records-Request-Packet-2024.pdf>

National Archives

<https://veteranrecs.archives.gov/VeteranRequest/home.html>

List of documents that assist survivors

- Will – Retirees can use the JAG/Legal office on Gowen Field for free.
- Communicate your funeral wishes. What would you like done at your funeral?
- Make arrangements with funeral home. How would you like your remains handled?
- Document all your accounts and the usernames and passwords. Such as:
 - Banking
 - Retirement Income
 - Social Media
 - Mobile/Cell Phone and/or computer
- Share locations for important paperwork:
 - Bills
 - Consider placing a statement to show what bills are expected.
 - How are they paid – from what account and how - check, fund transfer, cash?
 - Birth Certificate
 - Certificate of Death of Spouse/Former Spouse (if applicable).
 - Deeds, Titles – location of documents.
 - Divorce Decree(s) (if applicable).
 - Last Will and Testament – location of documents.
 - Life Insurance (from all applicable organizations/companies).
 - Marriage Certificate, Current (if applicable).
 - Military documents:
 - Retirement Orders
 - DD214/NGB 22 – Retirement
 - (DD214s from activation, mobilization/deployment)
 - Place Orders - All Title 10, or Title 32 under certain conditions in same document protector as DD214
 - DD215 Corrections to Retirement DD214 (if applicable)
 - Notice of Eligibility, 15-year or 20-year letter
 - Reserve Component Survivor Benefit Plan (RCSBP) election (from 20yr NOE) or Survivor Benefit Plan (SBP)
 - Separation Request Memo
 - Statement of Retirement Points (NGB23) OR Army RC – RPAM/DA 1506, Air Force RC – Chronological points statement
 - VA Disability Rating letters (if applicable)
 - VA list of disabilities that are service connected
 - VA Pre Burial acceptance letter (if applicable)
 - Social Security Card.
 - Intellectual Property (Copyrights, Trademarks, Patents).
- Make a list of who needs to be notified:

- Next of Kin
- Executor / Trustee
- Attorney
- Financial Planner / Accountant-CPA
- Arrange a home for your pet(s).
- Write Obituary / Death Notice.

When a death certificate is provided it is recommended that your family request multiple copies as most will not be returned.

Death Certificate / Idaho Department of Health and Welfare (IDHW)

To request copies of someone's death certificate go online or mail in a request to Idaho Health and Welfare.

Note: There are vendors who will charge additional fees to request these documents for you. Family members can use the IDHW website to request these records.

Who can request a death certificate?

- Immediate family members
- Legal representative
- Individuals needing documentation (property right) and can support request

What is needed to prove identity when requesting ([Link to IDHW site Here](#)):

A copy (both front and back) of the following will need to be provided with the request:

- Current Driver's License
- Passport
- Concealed Weapons Permit
- State Identification Card
- Tribal Identification Card
- Prison Identification Card

OR

A copy (both front and back) of two (2) of the following, with one having a signature

- Social Security Card with signature
- Work ID Card with signature
- Auto Registration with signature
- Traffic Ticket with signature
- Court Record with signature
- College/School ID with signature
- Hunting/Fishing License with signature
- Insurance Record/Auto Insurance with signature
- Driver Permit with signature
- Pay Stub with signature
- Passport Card with signature
- Matricula Card with signature

OR

- Notarized signature and proof of identity form – this can be requested through: IDHW by emailing: IVR@dhw.idaho.gov.

OR

- Other immediate family member with current ID request document.

Note: Proof of relationship to the deceased may be required.

Is there a cost/fee when ordering death certificates?

Yes, these fees can be found on the Idaho Department of Health and Welfare website.

List of fees when ordering from Vital Chek – on IDHW website: [Fees for ordering certificates through vitalchek](#).

How do I submit the request?

Option 1 – Online

Online orders go through VitalChek Network, Inc. (as of 21 July 2025).

Fill out the online request at [VitalChek](#), ensure that you have a digital copy of the support documents (listed above), payment method (Credit or debit card).

Note: If you require expedited shipping it *must be* annotated during the time of the order. Unprocessed/existing orders cannot be changed to rush or cancelled.

Option 2 – Mail

- Send all completed, signed, and clear copies to:
Idaho Bureau of Vital Records and Health Services
PO Box 83720
Boise, ID 83720-0036
- Requests sent by mail must contain the following documents:
 - [Idaho Vital Records Certificate Request Form - Death](#).
 - Photocopy of current driver's license (front and back). See list above for other identity documents accepted.
 - Check or money order made out to Idaho Vital Records for processing fees.

Note: If you require expedited shipping it *must be* annotated during the time of the order. Unprocessed/existing orders cannot be changed to rush, or cancelled.

Report the death of a veteran to:

Defense Finance and Accounting Service (DFAS)

IMPORTANT INFORMATION:

Prompt reporting of a death is important to avoid overpayment. Retired pay ends on the date of death of the retiree.

DFAS will stop monthly retired pay payments upon notification of death to prevent overpayment.

Because retired pay ends on the date of death, ***if a payment was issued after the date of the retiree's death, DFAS is required to notify the bank to reclaim the entire payment.*** The retiree's estate will submit an Arrears of Pay (AOP) to reclaim a prorated amount of the last payment.

If the retiree has a joint bank account, it is especially important to be aware that the entire payment will be reclaimed.

Arrears of Pay (AOP) is the pro-rated retirement annuity payment after the death of a retiree.

Whoever oversees the retiree's estate will request this through DFAS. This will go to the designated beneficiary (by direct deposit) once the request is processed. The beneficiary can be found on the back page of an electronic Retiree Account Statement (eRAS).

Note: All Retirement (annuity) payments made after the retiree's death must be returned to DFAS before AOP is paid.

Report a Retiree's Death

You have three options to report the death of a Retiree: Online, Phone Call or Fax/Mail the required documents.

Information Needed to Report a Retiree Death to DFAS

Before contacting DFAS, gather the following information. (This information will be on the Certificate of Death (COD) provided by the coroner.)

- Full Name
- Social Security Number
- Date of Death
- Cause of Death (Natural, Homicide, Pending, or Other)
- Marital Status

How to Report a Retiree's Death

Option 1 – Online

Fill out the online [askDFAS Notification of Death](#). You will need to have the following information available:

- Full Name.

- Email address (for claimant).
- Relationship to Retiree - Spouse (and date of marriage to Service Member), Son, Daughter, Mother, Father, Sister, Brother, Other.
- Be prepared to create a Passcode –
 - Passcodes must be a minimum of 15 characters.
 - Contain at least one lowercase letter, one uppercase letter, one number, and one special character.
 - Passcodes cannot contain your name or email address. Safeguard your passcode for future use.
- Address (to include foreign address)
- Phone Number

Option 2 - Call

- Call DFAS Customer Care Center at 1.800.321.1080.
- When you call, please be prepared to provide:
 - Retiree's Full Name
 - Retiree's Social Security Number
 - Date of Death

Option 3 – Fax or Mail

- Fax or Mail information to DFAS using the contact information listed later under *Annex A - Contact Information*.

It is strongly advised to use Option 1 or 2 for quickest notification to DFAS. If there are problems with the form online, please call DFAS Customer Care Center at 1.800.321.1080.

After Reporting the Death to DFAS - Condolence Letter and resolution of final pay.

After DFAS is notified, they will mail a condolence letter to the family member(s), legal representative or last known address. This letter is sent within five business days of notification and will include an Arrears of Pay (AOP) SF 1174 claim form.

What You Need to Do

1. Fill out:
 - Arrears of Pay (AOP) SF 1174
 - Direct Deposit form DFAS-CL Form 1059
2. Provide a copy of the Death Certificate (must have cause and/or manner of death indicated).
3. Submit to DFAS.

You can get a copy of SF 1174 from the DFAS's Forms Library website if you do not want to wait for the letter. Either way you must promptly fill out, sign, and return the SF 1174 form and the supporting documents.

Note: SF 1174 must be signed by two witnesses in addition to the claimant.

Note: Up to two claimants can use one SF 1174, but both must sign the document in front of both witnesses.

This form is used to submit for the pro-rated amount due the retiree's estate along with any other money due to the retiree at the time of the death. Once DFAS has received all necessary documents DFAS will calculate the retiree's final pay.

When filling out SF 1174 you can use a Form Wizard to guide you through the process. By filling in questions, the Form Wizard will place the appropriate answers into the corresponding blocks. You will still need to print the form for signatures of the claimant(s), and witnesses.

Note: You can visit *How to Claim a Retiree's Arrears of Pay (AOP)* website for how-to information and helpful tools for filling out and submitting these documents. Link to [DFAS Webpage](#).

To have the AOP direct deposited (vs. getting a mailed check) fill out a DFAS-CL Form 1059 Direct Deposit Sign-Up, available on the DFAS's Forms Library website. Avoid using a joint account that was shared with a deceased retiree for this deposit; banks return those payments to DFAS.

DFAS is required to have a copy of the retiree's death certificate that states the cause or manner of death prior to making any AOP payments.

You can contact your local Retirement Service Office or Family Programs Specialist if you need assistance or a document scanned.

To submit your documents:

Option 1 - Online

Upload a PDF of your completed/signed/witnessed SF 1174 form and supporting documents via the askDFAS website (Link [Here](#)), select *SBP Annuitant/Survivor - Form Upload Tools* under *Categories*, and *SF 1174 - Arrears of Pay (AOP) – Upload* under *Subcategories*.

Note: make sure the retiree's name and Social Security Number are on each document you upload (there should be a box/field that asks for this information on each form).

Option 2 - Mail

Send the SF 1174, DFAS-CL Form 1059 and death certificate to:

Defense Finance and Accounting Service
U.S. Military Retired Pay
8899 E 56th Street
Indianapolis IN 46249-1200

Note: You will not get these documents back.

Option 3 - Fax

Fax all documents to 1.800.469.6559

When should I expect payment?

DFAS will take 30-45 days to process the Arrears of Pay payment. If there is more than one beneficiary or no designated beneficiary, this time will be longer.

Survivor Benefit Plan (SBP) Application

If the deceased retiree was enrolled in the Survivor Benefit Plan (SBP), Reserve Component Survivor Benefits Plan (RCSBP), or the Retired Serviceman's Family Protection Plan (RSFPP), you will need to submit a request to DFAS for this benefit to start.

What You Need to Do

1. Fill out:
 - DD 2656-7 – Verification for Survivor Annuity
 - Direct Deposit forms (one of the following forms):
 - Fast Start Direct Deposit Form – FMS 2231, **or**
 - Direct Deposit Sign-Up Form – SF 1199A, **or**
 - International Direct Deposit Enrollment Form – SF 1199-I
 - IRS W4-P, Withholding Certificate for Pension or Annuity
2. Include:
 - Death Certificate (if this has not been done previously) must have cause or manner of death.
3. Submit to DFAS.

Note: If you haven't submitted a death certificate for the retiree, you will need to do so at this time.

If filling out the DD 2656-7 you can use a Form Wizard to assist you through the process. By filling in questions, the Form Wizard will place the appropriate answers into the corresponding blocks. You will still need to print the form for signature of claimant.

Note: Section 6 of the DD Form 2656-7 can be left blank if the Service Member died on or after January 1, 2023.

To submit your documents:

Option 1 - Online

Upload a PDF of your completed/signed/witnessed DD 2656-7 form and supporting documents via the askDFAS website ([Link Here](#)), select *SBP Annuitant/Survivor - Form Upload Tools* under *Categories*, and *DD 2656-7 - Claim SBP Annuity – Upload* under *Subcategories*.

Note: make sure the retiree's name and Social Security Number are on each document you upload (there should be a box/field that asks for this information on each form).

Option 2 - Mail

Send the DD 2656-7, one of the three Direct Deposit Forms, the IRS W4-P, and death certificate to:
Defense Finance and Accounting Service
U.S. Military Annuitant Pay
8899 E 56th Street
Indianapolis IN 46249-1300

Option 3 - Fax

Fax all documents to 1.800.982.8459

Survivor Benefit Plan - First annuity payment

With processing, you can expect your first SBP monthly annuity payment within 30 days of DFAS receiving the DD Form 2656-7 and supporting documentation.

However, payment may take 45 days or more if additional information is requested, research on application is needed, or computation of payment is complex.

The Retiree's Final Tax Document (1099-R)

This document is **generated with the Arrears of Pay payment to the beneficiary**. If the deceased retiree's legal representative (who is not the AOP beneficiary) needs a copy of the tax document, they will need to contact DFAS by mail or fax. If they submit a letter, it will need the following information:

Must be signed and dated.

Include the retiree's full name, Social Security Number.

Include the relationship of the requestor to the retiree, copy of Certificate of Death, and the 1099-R request.

Note: This process can take 30-60 days to complete.

To submit your documents:

Option 1 - Mail

Defense Finance and Accounting Service
U.S. Military Annuitant Pay
8899 E 56th Street
Indianapolis, IN 46249-1300

Option 2 - Fax

Fax all documents to 1.800.469.6559

Veterans Affairs (VA)

Veteran Service Officers

A Veteran Service Officer (VSO) is a trained and accredited representative who helps veterans and their families obtain benefits or privileges from the Department of Veterans Affairs (VA). You can find an accredited representative using the VA search tool on VA.gov (Link [Here](#)).

There are three types of representatives:

Accredited VSO – provides free services for veterans / families and has been trained / tested in submitting VA claims and decision reviews. Works for a Veteran Service Organization (IDVS, DAV, VFW, AL). Assists veterans / families in collecting evidence, filing a claim, or requesting a decision review. With a release from the veteran or family they can communicate with the VA on your behalf.

Accredited Attorney – can charge fees for services, does not have to be trained in VA processes / paperwork. Primarily work on decision reviews and cases that are legal in nature (required to pass bar examination and be in good standing).

Accredited Claims Agent – can charge fees for services, does not work for a Veteran Service Organization but has gone through training and testing.

Contact the accredited representative

After you find the accredited representative, you should contact them to:

- Ask if they're available to help you.
- Ask if there is a charge for their services and what that cost is.
- Ask them which organization to name on your form (see below).

How to Appoint an accredited representative

Fill out one of the PDF forms listed here. The form you'll need to fill out depends on the type of accredited representative you're appointing.

Note: By submitting either of these documents you will either establish your representative or replace an existing representative.

Note: Both you and the accredited representative will need to sign your form.

Note: How to contact if you have questions: 1.800.698.2411, ext. 0 (TTY: 711). Available 24/7.

- For accredited VSO representative, fill out an Appointment of Veterans Service Organization as Claimant's Representative (VA Form 21-22).
[Get VA Form 21-22 to download](#)
- For either accredited attorney or claims agent, fill out an Appointment of Individual as Claimant's Representative (VA Form 21-22a).
[Get VA Form 21-22a to download](#)

You or the accredited representative can submit your form in any of these 3 ways.

Option 1 - Online

Upload your form using the *QuickSubmit* tool through [AccessVA](#).

Note: You will need to use ID.me or Login.gov to sign-in.

If it's your first time signing in to this tool, you'll need to register first. After you've registered, you can upload your form.

Option 2 - Mail

Send your form to the address that's right for you.

To get help filing a disability compensation claim

- Department of Veterans Affairs
Evidence Intake Center
PO Box 4444
Janesville, WI 53547-4444

To get help applying for pension and survivor benefits

- Department of Veterans Affairs
Pension Intake Center
PO Box 5365
Janesville, WI 53547-5365

To get help requesting a Board Appeal

- Department of Veterans Affairs
Board of Veterans' Appeals
PO Box 27063
Washington, DC 20038

To get help appointing a fiduciary

- Department of Veterans Affairs
Fiduciary Intake
PO Box 95211
Lakeland, FL 33804-5211

Option 3 – In Person

Bring your form to a VA regional office near you, see *Annex A -Contact Information* for locations near Idaho.

[Find a VA regional office near you](#)

How to report the death of a Veteran to VA

It is strongly encouraged to report the death of a veteran as quickly as possible to prevent overpayment of benefits. The survivor or legal representative of the veteran can do this.

Reporting right away helps survivors avoid debt.

The VA will withdraw the last benefit amount paid to the Veteran. The amount recouped by the VA will be based off the date on the Certificate of Death.

Information you can provide to help the VA verify the Veteran's identity.

Before contacting the VA, gather the following information from the Certificate of Death and Discharge document (DD 214, NGB 22).

- Full name
- Social Security number or VA claim number
- Date of birth
- Date of death
- Branch of service

How to Report a Retiree's Death.

There are three ways to report a death. It is recommended to call the VA as the fastest way to report a death.

Option 1 – Call

Call us at 800.827.1000 (TTY: 711) and select 5.

Note: DFAS is available Monday through Friday, 8:00 a.m. to 9:00 p.m. Eastern Time (ET)

Note: A copy of the following documents will be requested if you report a death in person or by mail.

- Death certificate or other public record of the veteran's death
- Discharge document (like a DD214)

Option 2 - In person

- Bring your documents to a VA regional office near you, see *Annex A -Contact Information* for locations near Idaho.

Option 3 - Mail

- Department of Veterans Affairs
Claims Intake Center
PO Box 4444
Janesville, WI 53547-4444

Note: If you report by mail, be sure to include your relationship to the veteran.

Note: When you report a death by mail, it may take longer for DFAS to stop any benefit payments the veteran was receiving.

Veterans Burial Allowance or Veterans Death Benefits

Reimbursable costs for families of veterans that meet eligibility requirements.

Is the family eligible for allowances to help pay for a Veteran's burial and funeral costs?

If the surviving spouse or family is covering the funeral and burial expenses and not being reimbursed (either by a government agency, veteran's employer at time of death, or another organization), they may apply for reimbursement from the VA if they meet one of the relationship connections, and veteran circumstances.

Who can submit for reimbursement:

One of these relationships or professional roles describes your connection to the Veteran:

- You're the veteran's surviving spouse (Note: We recognize same-sex marriages.), **or**
- You're the surviving partner from a legal union (a relationship made formal in a document issued by the state recognizing the union), **or**
- You're a surviving child of the veteran, **or**
- You're a parent of the veteran, **or**
- You're the executor or administrator of the veteran's estate (someone who officially represents the veteran), **or**
- You're a family member or friend who isn't the executor of the veteran's estate, **or**
- You're a representative from a funeral home, cemetery, or other organization.

The Veteran must not have received a dishonorable discharge, and one of these circumstances must be true:

- The veteran died because of a service-connected disability (a disability related to service), **or**
- The veteran died while getting VA care, either at a VA facility or at a facility contracted by VA, **or**
- The veteran died while traveling with proper authorization, and at VA's expense, either to or from a facility for an examination, or to receive treatment or care, **or**
- The veteran died with an original or reopened claim for VA compensation or pension pending at the time of death, and they would've been entitled to benefits before the time of death, **or**
- The veteran died while receiving a VA pension or compensation, **or**
- The veteran died while eligible for compensation or a VA pension at their time of death, but instead received full military retirement or disability pay.

Or:

- The veteran had been getting a VA pension or compensation when they died, **or**
- The veteran had chosen to get military retired pay instead of compensation.

Note: The VA will provide an allowance for the cost of transporting a veteran's remains for burial in a national cemetery.

What can be submitted for reimbursement?

Eligible family members can submit for the following "burial allowance":

- Costs for burial and funeral.
- Cost of plot (gravesite) or interment.
- Cost for transportation (movement of the veteran's remains) to the final resting place.

How long does a family have to submit for reimbursement?

If a veteran died due to a non-service-connected death, filing must file within two (2) years after the veteran's funeral.

Note: If the veteran died of a non-service-connected death while getting care at or in a VA health facility or one contracted by the VA, there is no time limit to file a claim.

There isn't a time limit if the service member died due to a service-connected death.

If previously denied reimbursement due to a dishonorable discharge and that status is changed by a board of corrections, families have two (2) years from the discharge update to file a claim.

You can't get burial allowances for certain individuals

The VA doesn't provide burial allowances if the individual died while actively serving:

- On active duty, **or**
- As a member of Congress, **or**
- A federal prison sentence.

What documents are needed to support the application?

- Veteran's death certificate with cause of death listed.
- Transportation receipt – that is itemized, if you paid for movement of veteran's remains to final resting place.
- Copy of veteran's DD214

Burial allowance amounts

Note: See VA website for amounts for dates prior to ones listed.

Burial allowance amounts for a service-connected death

<u>Status</u>	<u>Maximum burial allowance</u>
If the veteran died on or after September 11, 2001	\$2,000

If the veteran is buried in a VA national cemetery

The VA may pay you back for some or all of the costs of moving the Veteran's remains

Burial allowance amounts for a non-service-connected death

Status

If the veteran died on or after October 1, 2024

Maximum burial allowance

The VA may pay a \$978 burial allowance and \$978 for a plot

Note: If a veteran's remains aren't claimed, the VA will pay the person or organization responsible for the veteran's burial a burial allowance based on the rates in this table. If the deceased qualifies, they may pay you back for the costs of moving the veteran's remains to a VA national cemetery.

Burial allowance amounts for a non-service-connected death if the veteran was hospitalized by VA at the time of their death

Status

If the veteran died on or after October 1, 2023

Maximum burial allowance

The VA pay a \$948 burial allowance and \$948 for a plot

The VA may also pay you back for some or all of the costs of moving the veteran's remains if one of these descriptions is true:

- The veteran was hospitalized or in a VA-contracted nursing home at the time of death, or
- The veteran died while traveling to VA-authorized care.

Headstone or marker allowance amounts

Headstone or marker allowance amounts based on when the veteran died

Status

If the veteran died on or after October 1, 2021

Maximum headstone or marker allowance

\$231

How to contact:

Option 1 – Online

You can apply for Burial Benefits and Transportation Benefits [Here](#).

Note: By signing in you can save your work and have up to 60 days to finish it, estimated time to complete form (when all information is available) is 30 minutes.

Option 2 – Mail

- Department of Veterans Affairs
Pension Intake Center
PO Box 5365
Janesville, WI 53547-5365

VA Dependency and Indemnity Compensation (DIC)

DIC is a tax-free monetary benefit for Spouses, Dependents, and/or Parents of Service Members who passed while meeting specific criteria (see below). You can submit an intent to file prior to submitting the DIC packet. This is called an “effective date” and allows you additional time to gather your supporting documents.

For current DIC rates check [here](#).

Eligibility for DIC

The VA states three (3) different beneficiaries: Surviving Spouse, Surviving Child, and Surviving Parent(s). Each has their own unique eligibility requirements.

Spouse -

You may be eligible for VA benefits or compensation if you meet one eligibility requirement in both sections:

Section 1 –

- You lived with the veteran or service member without a break until their death, **or**
- If you’re separated, you weren’t at fault for the separation.

Section 2 –

- You married the veteran or service member within 15 years of their discharge from the period of military service during which the qualifying illness or injury started or got worse, **or**
- You were married to the veteran or service member for at least 1 year, **or**
- You had a child with the veteran or service member.

Remarriage and Eligibility:

If you remarried, you must fit in one of the two following categories in addition to meeting the eligibility criteria listed above.

- You remarried on or after December 16, 2003, and you were 57 years of age or older at the time you remarried, **or**
- You remarried on or after January 5, 2021, and you were 55 years of age or older at the time you remarried.

Child –

To be eligible for DIC the following statements must be true:

- You aren’t married, **and**
- You aren’t included in the surviving spouse’s compensation, **and**
- You’re under the age of 18 (or under the age of 23 if attending school).

Note: If you were adopted out of the veteran’s or service member’s family, but meet all other eligibility criteria, you still qualify for compensation.

Parent –

Both of the following requirements must be met:

- You're the biological, adoptive, or foster parent of the veteran or service member, **and**
- Your income is below a certain amount ([Check the parents DIC rate table](#))

Note: The VA defines a foster parent as someone who served in the role of a parent to the veteran or service member before their last entry into active service.

What to submit for DIC claim

The proper VA form depends on the service members status and relationship of the person submitting the DIC claim.

- If service member died on active duty and you're the surviving spouse or child, fill out Application for DIC, Death Pension, and/or Accrued Benefits by a Surviving Spouse or Child (VA Form 21P-534a).
- If service member was a veteran when they passed and you're the surviving spouse or child of a Veteran, fill out an Application for DIC, Death Pension, and/or Accrued Benefits (VA Form 21P-534EZ).
- If you're the parent of a service member who passed, fill out an Application for Dependency and Indemnity Compensation by Parent(s) (VA Form 21P-535).

Survivors will need to submit the following information or allow the VA to gather the following items:

- Any service treatment and personnel records held by the veteran's National Guard or Reserve unit, **and**
- Any relevant private medical treatment records, **and**
- Any treatment records held at a federal facility that support the claim, **and**
- Any relevant evidence from a non-trained medical professional of chronic symptoms of the disability.

Provide evidence showing that one of these is true:

- The service member died while on active duty, active duty for training, or inactive-duty training, **or**
- The veteran died from a service-connected illness or injury, **or**
- The veteran didn't die from a service-connected illness or injury but was eligible to receive VA compensation for a service-connected disability rated as totally disabling for a certain period of time.

If the veteran's eligibility was due to a rating of totally disabling, they must have had this rating:

- For at least 10 years before their death, **or**

- Since their release from active duty and for at least 5 years immediately before their death,
or
- For at least 1 year before their death if they were a former prisoner of war who died after September 30, 1999.

Note: “Totally disabling” means it’s impossible for the veteran to work.

To submit your documents

It is recommended to work with an accredited Veteran Service Officer (VSO), attorney, or claims agent when filling and submitting for DIC. There are three ways that you can submit your documentation.

Option 1 – Online

Upload your form using the *QuickSubmit* tool through [AccessVA](#).

Note: You will need to use ID.me or Login.gov to sign-in. If it’s your first time signing in to this tool, you’ll need to register first. After you’ve registered, you can upload your form.

Option 2 – In-Person

Bring your documents to a VA regional office near you, see *Annex A -Contact Information* for locations near Idaho.

Option 3 - Mail

Department of Veterans Affairs
Pension Intake Center
PO Box 5365
Janesville, WI 53547-5365

Survivors Pension

Based on your income and net worth, survivors – spouses and unmarried dependent children may be eligible for monthly payments from the VA. Eligibility also depends on veteran’s service.

Am I eligible for a Survivors Pension as a surviving spouse?

Eligibility is based off several factors, from deceased veteran’s time in the military to your financial well-being, which includes income and net worth.

You will need to meet these criteria:

Your yearly family income and net worth meet certain limits set by Congress. Your net worth equals the value of everything you own (except your house, your car, and most home furnishings), minus any debt you owe.

Widowers must not have remarried after the veteran’s death, and children must not have married.

The deceased veteran must meet the following criteria:

The deceased veteran must not have received a dishonorable discharge, **and**

At least one of these must be true:

- The veteran entered active duty on or before September 7, 1980, and served at least 90 days on active military service, with at least 1 day during a covered wartime period, **or**
- The veteran entered active duty after September 7, 1980, and served at least 24 months or the full period for which they were called or ordered to active duty (with some exceptions), with at least 1 day during a covered wartime period, **or**
- The veteran was an officer and started active duty after October 16, 1981, and hadn't previously served on active duty for at least 24 months.

The VA uses the following wartime periods to determine eligibility for pension benefits:

- Mexican Border period (May 9, 1916, to April 5, 1917, for veterans who served in Mexico, on its borders, or in adjacent waters).
- World War I (April 6, 1917, to November 11, 1918).
- World War II (December 7, 1941, to December 31, 1946).
- Korean conflict (June 27, 1950, to January 31, 1955).
- Vietnam War era for veterans who served in the Republic of Vietnam (November 1, 1955, to May 7, 1975).
- Vietnam War era for veterans who served outside the Republic of Vietnam (August 5, 1964, to May 7, 1975).
- Gulf War (August 2, 1990, through a future date to be set by law or presidential proclamation).

Survivors Pension evidence needed:

You'll need to submit or give the VA permission to gather these:

- The veteran's DD214 or other separation documents, **and**
- The veteran's death certificate, showing cause of death.

If you're a surviving spouse, you'll also need to submit:

- Your marriage certificate or other evidence showing you were married to the veteran for at least 1 year immediately before their death, **or**
- Evidence that you and the veteran had a child that was born either before or during your marriage, **or**
- Evidence that you were married before a fixed date based on certain wartime periods.

What evidence must show for Survivors Pension benefits based on your net worth:

- You'll need to submit evidence that shows your family net worth and yearly income meet certain limits set by Congress, **and**

- Submit evidence that shows the deceased veteran didn't receive a dishonorable discharge and their service meets at least one of the requirements listed here (above).

Notice to survivors.

The VA is required by law to tell you what evidence you'll need to provide to support your Survivors Pension claim. For your convenience, the information here is a summary of evidence requirements (called "section 5103 notice"). You can find the official evidence requirements in the [Application for DIC, Survivors Pension, and/or Accrued Benefits \(VA Form 21P-534EZ\)](#).

Go to the Application for DIC, Survivors Pension, and/or Accrued Benefits to get the official evidence requirements.

To submit your documents

Option 1 – Online

Upload your form using the *QuickSubmit* tool through [AccessVA](#).

Note: You will need to use ID.me or Login.gov to sign-in. If it's your first time signing in to this tool, you'll need to register first. After you've registered, you can upload your form.

Option 2 – In-Person

Bring your documents to a VA regional office near you, see *Annex A -Contact Information* for locations near Idaho.

Option 3 - Mail

Department of Veterans Affairs
Pension Intake Center
PO Box 5365
Janesville, WI 53547-5365

VA Aid and Attendance Benefits and Housebound Allowance

If the spouse of a deceased veteran requires assistance with daily activities or is housebound due to a permanent disability you may be eligible for additional financial assistance.

Note: You cannot receive both of these at the same time.

Eligibility criteria for:

- **Aid and Attendance Benefits:**
 - Spouse needs assistance with basic daily requirements, such as bathing, feeding, and dressing, **or**
 - Spouse is bedridden, or stays in bed a majority of the day due to illness, **or**
 - Spouse is in a nursing home because of the loss of mental or physical ability as related to a disability, **or**
 - Spouse has limited eyesight (5/200 with glasses or contact lenses) in both eyes, or the visual field limited to 5 degrees or less due to concentric contraction.
- **Housebound Benefits:**
 - Spouse has a permanent disability causing them to spend most of their time inside their home.

How do you apply for these benefits?

You will need to fill out [VA Form 21-2680](#) (Examination for Housebound Status or Permanent Need for Regular Aid and Attendance), and can include supporting documentation.

Note: It is recommended that your doctor assist in filling out the section dealing with examination information.

Supporting documents for your application:

- Doctor's reports supporting the need for Aid and Attendance or Housebound Care.
- Details about daily activities and how you travel to get
- Statements that support how illness, injury, mental, or physical disability impleads with your ability to be self-sufficient.

If you currently reside in a nursing home

You will need to provide a VA Form 21-0779 (Request for Nursing Home Information in Connection with Claim for Aid and Attendance).

To submit your documents

Option 1 – In-Person

Bring your documents to a VA regional office near you, see *Annex A -Contact Information* for locations near Idaho.

Option 2 – Online

Go to the VA website to upload your form (This webpage has a link to download the form as well).

[Upload Form 21-2680.](#)

Note: Need assistance in filling out this form online call: 800.698.2411 (TTY: 711), available 24/7.

Option 3 - Mail

Department of Veterans Affairs
Pension Intake Center
PO Box 5365
Janesville, WI 53547-5365

Secondary Dependency

Individual(s) who are unable to support themselves due to mental or physical limitations and require more than 50% of financial support from the service member. Children in this category will have to confirm their status every four years.

This is done in one of three ways, the first two options are generally available if you received a postcard from DEERS/DMDC, the last one is for individuals who have outdated doctor's letters or other guidance from DEERS/DMDC.

Option 1 –

Visit the local / closest DEERS/ID Card facility

Option 2 – Mail

Sent required documents to the branch appropriate DEERS/RAPIDS Project Office

Note: Instructions can be found in the [Incapacitated Dependent Redetermination brochure.](#)

Option 3 – Submit complete Secondary Dependency application.

Note: Instructions can be found at “[How do I Apply for a Secondary Dependent?](#)”

How to report a death to Social Security Administration (SSA) and Medicare

The SSA handles death reports for both Social Security (SS) and Medicare recipients. To report a death, you can do one of the following:

Option 1 – Funeral Director

Provide the deceased person's Social Security number to the funeral director so they can report the death to the SSA.

Option 2 – Call

Call the SSA's main number at 1.800.772.1213 (TTY 1.800.325.0778) to make the report.

Option 2 – In-Person

Look up and contact your local Social Security office. [Field Office Locator](#).

Note: SSA only accepts reports of death by phone or in person. They do not accept reports by email or online.

Note: If you report the death to SSA yourself instead of through a funeral director, you may do so without the deceased person's death certificate to begin the process. But you will need it later to complete the report.

If a U.S. citizen lives outside the United States

Report the death to the nearest U.S. embassy or consulate and contact a [Federal Benefits Unit](#).

What Social Security Benefits need to be returned?

SSA benefits stop the same month that the veteran died. Payments are received after the fact, or the following month. If a veteran passes in the month of April, their benefit check would be deposited in May and that check (and any others received after that month) would have to be returned to SSA.

How to return a deceased person's Social Security payment (per the Social Security Handbook dated 23 Jan 2007).

If the payment is by direct deposit, notify the financial institution as soon as possible. Ask them to return the payment for the month the recipient died and any deposited after that month.

SSA Survivor Benefits

If you are the spouse, child, dependent parent, or former spouse you may qualify for survivor benefits. If approved, eligible family members would receive a monthly payment with the amount determined by veteran's work history, relationship to deceased, and age applicant.

[Who can get Survivor Benefits](#)

Spouses and former/ex-spouses

Eligibility criteria:

- Didn't remarry before age 60 (age 50 if you have a disability), **and**
- You are 60 or older, or age 50–59 if you have a disability, **and**
- Were married for at least 9 months before your spouse's death.

Note: Former spouses married for at least 10 years to the veteran, including some domestic partners in valid non-marital legal relationships, could be eligible.

Payments start at 71.5% of your spouse's benefit and increase the longer you wait to apply.

For example, you might get:

- Over 75% at age 61.
- Over 80% at age 63.
- Over 90% at age 65.
- You can get up to 100% when you reach your “Full Retirement Age for Survivor Benefits” (between ages 66–67).

While getting survivor benefits there may be earning limits based off your age and income. If you exceed this limit your payments are temporarily reduced.

Your Survivor Benefit can be reduced if you’re receiving a government pension.

Certain circumstances provide eligibility, such as caring for a child of veteran who died, you might be eligible regardless of age and how long you were married.

Children

Children of veterans may be eligible if they meet the following criteria:

- Unmarried, **and**
- Age 17 and younger, **or**
- Ages 18–19 and in school (K–12) full time, **or**
- Any age if they developed a disability at age 21 or younger.

Note: Under certain circumstances, we can also pay benefits to married children, stepchildren, adopted children, grandchildren, and step grandchildren.

Children that are approved to receive survivor benefits may get up to 75% of the Veteran’s benefit.

Family Maximum

A limitation of how much a family may receive, which can cause individual payments to be under authorized amounts to meet this limit.

Ex-spouses don’t count toward the family maximum.

Dependent parents

If you were financially supported by the veteran and 62 or older, you might be eligible.

What you could get

Based on the work history of the veteran you might be eligible for:

- A monthly payment.
- Medicare if you’re 65 or older, or you have a disability or end-stage renal disease (ESRD).

Get a benefit estimate

You can request an estimate from the SSA by contacting them and giving them the Social Security number of the family member who died. If you don’t have it, verification will be attempted by personal questions about the deceased (date of birth, parent’s names).

You can request this estimate by calling:

- Call 800.772.1213 (TTY 800.325.0778)

Available in U.S. time zones Monday through Friday, 8 a.m. to 7 p.m., in English, Spanish, and other languages.

Survivor and other benefits

- If eligible for multiple benefits, you will pick which payment benefits you most.
- You cannot combine payments.
- You can change which benefit you receive e.g., you could start with Survivor Benefits and then change to your Retirement Benefit at age 70 when that payment is highest.

Lump-sum death payment

Pending eligibility, spouses or some minor children can apply for a one-time death benefit payment of \$255.

Information you need to apply for Survivor Benefits from Social Security

Social Security may ask you to verify eligibility by providing some or all the following information/documents:

- Proof of the veteran's death
- Birth certificate or other proof of birth
- Proof of U.S. citizenship or lawful alien status if you were not born in the United States
- U.S. military discharge paper(s) if you or the veteran had military service before 1968
- For disability benefits, the two forms ([SSA-3368](#) and [SSA-827](#)) that describe your medical condition and authorize disclosure of information.
- Tax returns and W-2 forms(s) and/or self-employment tax returns for last year
- Marriage certificate: **and**
- Final divorce decree, if applying as a surviving divorced spouse.

Note: SSA needs the original documents, like birth certificate (they will return them to you), but can take photocopies of W-2 forms, self-employment tax returns or medical documents.

Do not delay filing your claim just because you do not have all the documents. We will help you get them.

What they will ask you

- The veterans' name (name at birth if different), gender, social security number, date of birth, date of death, and place of death.
- Your date of birth and place of birth (state or foreign country).
- Whether a public or religious record was made of your birth before age five (5).
- Your citizenship status.
- Whether you have used any other Social Security number.

- The state or foreign country of the Veteran's fixed permanent residence at the time of death.
- Whether you or anyone else has ever filed for Social Security Benefits, Medicare or Supplemental Security Income on your behalf. (If so, they will also ask for information on whose Social Security record you applied.)
- Whether the veteran ever filed for Social Security Benefits, Medicare or Supplemental Security Income. (If so, they will also ask for information on whose Social Security record you applied.)
- Whether you (the qualified dependent) became unable to work because of illnesses, injuries or conditions at any time within the past 14 months. (If "Yes," the SSA will also ask you the date you became unable to work.)
- Whether the veteran was unable to work because of illnesses, injuries or conditions at any time during the 14 months before their death. (If "Yes," we will also ask you the date they became unable to work.)
- Whether you or the veteran were ever in the active military service before 1968 and, if so, the dates of service and whether you receive or are eligible to receive a pension from a military or federal civilian agency.
- Whether you or the veteran worked for the railroad industry.
- Whether you or the veteran ever earned social security credits under another country's social security system.
- Whether you qualified for or expect to receive a pension or annuity based on your own employment with the federal government of the United States or one of its states or local subdivisions.
- The names, dates of birth (or age) and Social Security numbers (if known) of your or the veteran's former spouses.
- The dates and locations of your marriages, and for marriages that have ended, how, when, and where they ended.
- The dates and locations of the veteran's marriages, and for marriages that have ended, how, when, and where they ended.
- The amount of the veteran's earnings in the year of death and the preceding year.
- Whether the veteran's had earnings in all years since 1978.
- The amount of your earnings for this year, last year and next year.
- Whether the veteran had a parent who was dependent on the veteran for half of his or her support at the time of the veteran's death or at the time the veteran became disabled.
- Whether you were living with the veteran at the time of death.
- The month you want your benefits to begin; **and**
- If you are within 3 months of age 65, whether you want to enroll in Medical Insurance (Part B of Medicare).

Note: This is not a full list of questions, just the more commonly asked ones. They may have additional clarification questions after asking these.

Note: You will need either a [SF 1199A Direct Deposit Sign-Up Form](#) or [FMS 2231 Faststart Direct Deposit](#) form. If unable to bring that with you, your checkbook or other papers that show your account number at a bank, credit union or other financial institution to avoid worries about lost or stolen checks and mail delays.

If receiving Survivor Benefits, changes that need to be reported to the SSA

SSA requires you to promptly report if any of the following items change:

- Personal information (changes to):
 - Name
 - Phone number
 - Mailing address
 - Direct deposit account
- Personal situation
 - Marital status
 - Citizenship and immigration status
 - Incarceration
 - School attendance (K-12)
 - Custody changes of a child who gets benefits
- Employment and wages if you're age 66 or younger (under Full Retirement Age)
 - Employment status and self-employment
 - Wages over \$22,320 in 2024 (pre-tax)

How to contact the Social Security Administration

Option 1 – Phone

Call 800.772.1213 (TTY 800.325.0778)

Option 2 – In-Person

Look up and contact your local Social Security office. [Field Office Locator](#).

Note: While not necessary, making an appointment is recommended.

Internal Revenue Service (IRS)

Upon notification, DFAS will send a final 1099R once they have received all necessary documents. You can use this to prepare the veteran's tax return as normal.

Note: Ensure that all income earned until date of death is reported and claim all eligible credits and deductions.

Note: Check eligibility to file joint return if veteran was married at time of death.

Note: If the veteran had not submitted individual income tax returns for previous years, the estate may have to file for them.

Note: It is the responsibility of the estate to pay any taxes owed or collect any refunds.

File a Current Tax Year Return

File the return using either of these Forms

- [1040, U.S. Individual Tax Return](#) or
- [1040-SR, U.S. Tax Return for Seniors](#). See [Form 1040 or 1040-SR Instructions](#).

For additional information see:

- [Publication 17, Your Federal Income Tax](#) supplements information in the tax form instructions.
- [Publication 559, Survivors, Executors and Administrators](#) helps those managing a deceased person's affairs through the income tax filing process.

To File a Prior Year Return

See the [request deceased person's information](#) prior to submitting a information request to the IRS.

To confirm that the Veteran had submitted tax forms for the previous years submit [Form 4506-T, Request for Transcript of Tax Return](#).

Pay Taxes Owed

If the Veteran owes taxes on current or previous years, the estate can check their options for repayment at [paying your taxes](#).

Claim a Refund

If a refund is due on the individual income tax return of the deceased, claim the refund by submitting [Form 1310, Statement of a Person Claiming Refund Due a Deceased Taxpayer](#).

Federal Employee Benefits – (This is not Military Retirement)

Report Annuitant Death to OPM

If a veteran is receiving retirement benefits from Office of Personnel Management (OPM), - Civil Service Retirement System (CSRS), or the Federal Employees Retirement System (FERS) the notification process is conducted online.

To submit your documents

Option 1 – Online

Report Annuitant Death - <https://rsreporting.opm.gov/AnnuitantDeath>

Report Employee Death to OPM

This application is used for claim processing by federal personnel or payroll officers when there is a widow or widower who may be eligible for recurring monthly payments under the Civil Service Retirement System (CSRS) or the Federal Employees Retirement System (FERS). If you are a relative reporting the death of a federal employee, please contact the personnel office of the agency where your family member was employed.

To submit your documents

Option 1 – Online

Report Employee Death - <https://rsreporting.opm.gov/EmployeeDeath>

You may wish to find out more about how family members apply for benefits by selecting the following item.

How Family Members Apply for Benefits

- Contact the personnel office of the federal agency where the employee worked.
- You should complete the Application for Death Benefits, Form (SF) 3104, **and**
- Attach any other forms and/or evidence as the application or circumstances require.
- Attach a copy of the employee's death certificate, **and**
- Copy of the certificate of marriage to the widow or widower.
- Give the application to the personnel office.

Note: If you are the surviving spouse or former spouse, you and deceased person's employing agency should also complete Form (SF) 3104B Standard Documentation and Elections in Support Application for Death Benefits when Deceased was an Employee at the Time of Death.

Note: A widow or widower who is claiming benefits for himself/herself and on behalf of children should file one application.

How Family Members Apply for Benefits

Defense Enrollment Eligibility Reporting System (DEERS)

Update the Defense Enrollment Eligibility Reporting System (DEERS) to show the death of the veteran, you have three options:

To submit your documents

Option 1 – In-person

Take a copy of the death certificate to the nearest military ID card issuing facility.

Option 2 - Mail

Mail a copy (please do not mail originals) of the death certificate along with the sponsor's Social Security Number (SSN) to:

- DMDC/DEERS Support Office
400 Gigling Road
Seaside, CA 93955

Option 3: Fax

Fax it to the Defense Manpower Data Center (DMDC)/DEERS Support Office at 800.336.4416.

BENEFEDS

If a covered family member dies while you are enrolled in a FEDVIP dental plan or a FEDVIP vision plan, contact BENEFEDS at www.BENEFEDS.com. Those without access to a computer can contact BENEFEDS by phone at 1.877.888.FEDS (3337), TTY 1.877.889.5680.

Express Scripts

You must report the death to the pharmacy contractor, Express Scripts. For medical and dental care, the Defense Manpower Data Center (DMDC) gets information from the Social Security Administration (SSA) or the services. See *Annex A – Contact Information* for phone numbers and email.

U.S. Passports

You can [return the person's passport](#) to the Department of State (DOS) for cancellation. (See "How do I cancel the passport of a deceased relative?" for instructions.)

- This helps prevent identity theft.
- The DOS will send the canceled passport back if you want it or they can destroy it.

State Social Services/Benefits

Contact the [state social services office \(Idaho Department of Health & Welfare\)](#) to cancel payments for benefit programs. These may include:

- SNAP (food stamps)
- TANF (welfare)
- Rental assistance
- Medicaid

Voter Registration

Contact your local county clerk: <https://voteidaho.gov/county-clerk/>

TRICARE Medical Coverage

Note: TRICARE uses the word *sponsor* instead of *veteran*.

Coverage was –

- ❖ **TRICARE Retired Reserve**

You may qualify to continue or purchase TRICARE Retired Reserve.

If You Already Have TRICARE Retired Reserve

You can use TRICARE Retired Reserve until the day your sponsor (the veteran) would have turned 60.

Your family member coverage automatically changes to survivor coverage.

You can choose to opt out of survivor coverage.

If You Don't Already Have TRICARE Retired Reserve

If only your sponsor had TRICARE Retired Reserve when he or she died, you can purchase coverage at any time before your sponsor would have turned 60. If your sponsor didn't have TRICARE Retired Reserve before he or she died, you can't buy coverage.

- For coverage to begin the day after your sponsor's death, submit your enrollment application within 90 days of your sponsor's death.
- If you don't submit it within 90 days, coverage will begin the first of the month after the application is submitted.

All the following must apply:

- Your sponsor had TRICARE Retired Reserve when he or she died, **and**
- You're an eligible beneficiary (e.g. spouse, child), **and**
- You're listed in the Defense Enrollment Eligibility Reporting System (DEERS) , **and**
- Your coverage would begin before the date your sponsor would have turned 60 years old.

The Federal Employee Health Benefits (FEHB) Program doesn't affect your survivor coverage.

❖ **TRICARE Prime or Select**

If a sponsor dies after retiring and is 60 years old (either regular or medical retirement), surviving family members remain eligible for TRICARE with the same health plan options and costs they had before their sponsor passed away.

Surviving spouses remain eligible for TRICARE unless they remarry and children remain eligible until they age out or lose eligibility for TRICARE for other reasons.

❖ **TRICARE for Life**

Retired Service Members and Their Families

If you are entitled to Medicare Part A:

- You must have Medicare Part B to keep your TRICARE coverage, even if you live overseas.
- You will lose your TRICARE coverage if you don't have Part B, if you drop Part B, or fail to pay your Part B premiums.

You should sign up for Medicare Part B when you first become eligible to avoid Medicare Part B late enrollment higher premium.

This also applies to:

- *Medically retired service members and their families.*
- *Retired Guard/Reserve members aged 60 and older.*
- *Family members of retired Guard/Reserve members aged 60 and older.*

Your Health Plan Options with Medicare Parts A & B:

- You're covered automatically by TRICARE For Life and TRICARE's pharmacy benefit.
- If you are under age 65, you can enroll in TRICARE Prime, or the US Family Health plan and your enrollment fees are waived.

Medicare Qualification Scenarios:

Disability

- You become eligible for Medicare beginning the 25th month of receiving Social Security disability payments.
- The Social Security Administration (SSA) notifies you of your Medicare entitlement start date.
- If you return to work, your disability benefits will be suspended if your income exceeds the threshold.

However, your Medicare entitlement may continue up to eight and a half (8 1/2) years following the suspension of disability benefits. You'll get a bill from Medicare every three months. You must keep Medicare Part B to keep TRICARE.

End Stage Renal Disease (ESRD)

- Medicare coverage isn't automatic for people with ESRD.
- You need to sign-up for Medicare benefits.
- Failure to sign-up for Medicare benefits will result in loss of TRICARE coverage.

Your Medicare coverage begins:

- The fourth month you're on renal dialysis.
- The month you're admitted to a Medicare-approved hospital for kidney transplant, or in the following two months; or
- Two months before your transplant if your transplant is delayed more than two months after admission to the hospital.

Age 65

- You become eligible for Medicare Part A at age 65 if you or your spouse paid into Social Security for at least 40 quarters (at least ten years of work).

You must have Medicare Part A and B to have TRICARE coverage when you are 65. Or you must have proof of your inability to apply for Medicare. If you're 65, but have an active-duty sponsor, you don't have to have Medicare Part B until your sponsor is retired. Sign up before your sponsor retires to avoid a gap in TRICARE coverage.

Are you already getting benefits from Social Security, the Railroad Retirement Board (RRB), or Office of Personnel Management (OPM)?

<i>Yes, I am getting benefits:</i>	<i>No, I'm not getting benefits:</i>
<ul style="list-style-type: none">• You're automatically entitled to Medicare Part A and are enrolled in Medicare Part B starting the first day of the month you turn 65.• If your birthday is on the first of the month, Part A and Part B are effective on the first day of the previous month.	<ul style="list-style-type: none">• You must sign up for Medicare Part A & B• Sign-up for Part B during your Medicare Initial Enrollment Period• To avoid a break in TRICARE coverage be sure to enroll no later than two months before you turn 65.• If you enroll any later, your Part B effective date will be delayed, and you will have a break in TRICARE coverage.

If You Were Already Entitled to Medicare before Age 65

- Your Medicare coverage will continue without interruption after your 65th birthday.

- If you don't have Part B, you will automatically be enrolled the month you turn 65, or the previous month if your birthday is on the first of the month.
- If you were paying a premium surcharge, it will be removed.

If You Have Employer-Sponsored Group Health Plan Coverage

Medicare allows you to sign up later during a **special enrollment period**. This is available:

- Anytime while you are working and covered by employer sponsored coverage.
- During the first eight months following the month that (1) employment ends, or (2) group health plan coverage ends, whichever is first.

But remember, to keep your TRICARE coverage you must have Medicare Part B.

- If you delay your Part B enrollment, you won't be covered by TRICARE For Life and TRICARE won't act as a second payer to your employer sponsored group health plan coverage.
- To have TRICARE coverage when your employer sponsored group health plan coverage ends, you should sign up for Part B during the special enrollment period described above.

Civilian Employment Benefits

Funeral Honors

Families of service members can request funeral honors – firing squad, taps played, flag folded, through the funeral home. The director of the funeral home will need a copy of the service member's DD-214 for proof of service. This proof will be given to Veterans' Affairs to get the flag for the service.

In Idaho, if the family is having problems with coordinating this through the funeral home, they can call the Idaho Honor Guard at 208.272.3763 or Retirement Services at 208.272.3815.

ANNEX A

Contact information:

BENEFEDS – Federal Employees Dental and Vision Insurance Program (FEDVIP)

Customer Service Number: 877.888.3337 (TTY: 877.889.5680)

BENEFEDS Website: <https://www.benefeds.com/>

Mail Address:

BENEFEDS – FEDVIP
P.O. Box 797
Greenland, NH 03840-0797

Defense Enrollment Eligibility Reporting System (DEERS)/ID Cards

Gowen Field Office

Customer Service Number: 208.272.3795 - Tu – F, 7am to 4pm MST

DEERS Office

4250 W. Cessna St., Bldg. 270
Boise, ID 83705

ID Card Office Locator & Appointments (Website)

<https://idco.dmdc.osd.mil/idco/locator>

Defense Finance Accounting Service (DFAS)

Customer Service Numbers

- Retired Military and Annuitant Pay: 888.332.7411, opt 4, then opt 2, 8am to 5pm EST
- Self Service Options: 888.332.7411, opt 1, available 24 hrs. a day
- Report the Death of a Military Retiree, 888.332.7411, opt 2, 8am to 5pm EST

Website: <https://www.dfas.mil/>

- Forms Library: <https://www.dfas.mil/RetiredMilitary/forms/>
- Questions/DFAS POC: <https://www.dfas.mil/dfas/AskDFAS/>
- Questions/Military Pay, Retired & Annuitant:
<https://www.dfas.mil/customerservice/Customer-Service-2/>
- askDFAS Online Tools for Retirees & Annuitants:
<https://www.dfas.mil/RetiredMilitary/Retiree-askDFAS-Online-Tools/#addr>

Defense Manpower Data Center (DMDC)

Customer Service Number: 800.538.9552 (TTY/TTD: 833.363.2883)

Fax Number: 800.336.4416

Address:

Defense Manpower Data Center Support Office
400 Gigling Road
Seaside, CA 93955-6771

Express Scripts (TRICARE)

Customer Service Number: 877.363.1303 (TTP 877.540.6261)

Express Scripts Website: <https://militaryrx.express-scripts.com/>

Online Message: DOD.customer.relations@express-scripts.com

Idaho National Guard Legal Office - JAG

Office Number: 208.272.5199

Address: 3882 W. Ellsworth St. Bldg. 440, Rm 206a,
Gowen Field, Boise, ID, 83705

Internal Revenue Service (IRS)

Contact Numbers:

Individual(s): 800.829.1040 (7am to 7pm local time)

Estate and gift taxes: 866.699.4083 (10am to 2pm Eastern time)

IRS Main Webpage: <https://www.irs.gov/>

IRS main help page: <https://www.irs.gov/help/let-us-help-you>

milConnect

Contact Numbers:

Benefits Support (DMDC/DEERS Support Office): 800.538.9552

Web Site Assistance: 800.368.3665

Website: <https://milconnect.dmdc.osd.mil/milconnect/>

Office of Personnel Management (OPM)

Retirement Information Office: 888.767.6838 (Mon-Fri, 7:40am to 5:00pm EST)

Office of Personnel Management: <https://www.opm.gov/>

OPM Retirement Center: <https://www.opm.gov/retirement-center/>

OPM Survivor Benefits: <https://www.opm.gov/retirement-center/survivor-benefits/>

Replace Medals, Awards, and Decorations

See Page 54 for details/instructions.

Request Military Service Records

See Page 51 for details/instructions.

National Archives

eVeteranRecs (online request): <https://veteranrecs.archives.gov/VeteranRequest/home.html>

Social Security Administration

Customer Service Number (To report a death): 800.772.1213 (TTY/TTD: 800.325.0778)

SSA Website (Government site): <https://www.ssa.gov/>

SSA Website Online Services (Government site): <https://www.ssa.gov/onlineservices/>

SSA Website Forms (Government site): <https://www.ssa.gov/forms/>

Field Office Locator: <https://secure.ssa.gov/ICON/main.jsp>

TRICARE

Federal Website:

TRICARE Website: <https://tricare.mil/>

Contractor Website:

TriWest Healthcare Alliance (Contracted Provider, West of Mississippi River)

Customer Service Number: 888.874.9378

TriWest main webpage: <https://www.triwest.com/>

TriWest sign-in page: <https://tricare-bene.triwest.com/signin>

TRICARE for Life

Customer Service Number: 866.773.0404 (TDD: 866.773.0405)

TRICARE Website (Government site): <https://www.tricare.mil/Plans/HealthPlans/TFL>

Wisconsin Physicians Service Insurance Corp. Website (Contracted Provider):

<https://www.tricare4u.com/wps/portal/tdb/tricare4u/home/>

Veterans Affairs (VA)

Main Information Line: 800.698.2411

Interpreter assistance: 800.698.2411, Opt. 0

TTY: 711

Helpful VA Phone Numbers Website: <https://www.va.gov/resources/helpful-va-phone-numbers/>

Civilian Health and Medical Program of the Department of Veteran Affairs (CHAMPVA)

Customer Service Number: 800.733.8387 – M-F, 805am to 730pm EST.

CHAMPVA Meds by Mail

Customer Service Number: 888.385.0235 – M-F, 8am to 530pm MST.

Customer Service Number: 866.229.7389 – M-F, 8am to 530pm EST.

Benefits Hotline

Customer Service Number: 800.827.1000 – M-F, 8am to 9 pm EST.

Burial Allowance & Transportation Benefits

VA Website: <https://www.va.gov/burials-memorials/Veterans-burial-allowance/>

Trouble in using online form: 800.698.2411 (TTY: 711) – 24/7 availability.

Dependency and Indemnity Compensation (DIC)

VA Website: <https://www.va.gov/disability/dependency-indemnity-compensation/>

Evidence/Documents needed: <https://www.va.gov/resources/evidence-to-support-va-pension-dic-or-accrued-benefits-claims/#dependency-and-indeemnity-compe>
DIC benefit rates: <https://www.va.gov/disability/survivor-dic-rates/>

GI Bill Hotline

Customer Service Number: 888.442.4551 – M-F, 8am to 7pm EST

Loan Guaranty Service

Customer Service Number: 877.827.3702 – M-F, 8am to 6pm EST

Veteran Service Officer (VSO)

Find an accredited representative:

Website: <https://www.va.gov/get-help-from-accredited-representative/find-rep/>

FAQs and other resources

VA FAQs, step-by-step guides, and other resources can help answer specific questions you may have about these topics:

- Your VA benefits and services.
- How to use VA.gov to manage your benefits.
- How to update your address and other information in your VA.gov profile.
- Topics include: VA Account and Profile, Burials and Memorials, Decision Reviews and Appeals, Disability, Education and Training, Health Care, Life Insurance, Pension, Other topics and questions.

Website Link: <https://www.va.gov/resources/>

ANNEX B

askDFAS – Online services for retirees

askDFAS has three primary ways to submit information or questions to DFAS for both retirees and annuitant/survivor.

Option 1 – askDFAS, Self-Service Account Changes, this allows you to:

- Update your mailing address – for either retiree or SBP annuitant.
- Request verification of pay – using an online form.

Option 2 – askDFAS, Retiree – Form Upload Tools, a secure way to allow a retiree to submit:

- DD 2558 – Allotment Updates
- DD 2894 – Designation of Beneficiary
- Power of Attorney
- Retirement Paperwork for either Active or Reserve components
- Survivor Benefit Plan paperwork
- Tax Withholding Changes

See full list here:

Note: many uploads will send a reply email of receiving the document and status updates as paperwork is processed.

How to upload documents to DFAS

- Determine required form(s) for action requested, fill out required information. Compile all forms into one (1) PDF file (but not a portfolio), all other files are prohibited. Label file with last name, and either form number or action requested. (i.e.: Smith DD2656-6 or Smith Survivor Benefit Plan Election Change)
- Select link that best describes the action required.
- Review instructions on webpage and select ‘Confirmation’ button.
- Click ‘Choose File’ and select the previously mentioned file. ENSURE that document(s) have been signed and SSN is included on at least one document.
- Click ‘Upload File(s)’ – you should get pop up stating successful.
- Click ‘Submit’ – you will get a pop-up window with a reference number and link. This information should also come to the email entered when filling out the online portion.

Note: It will take up to three business days for your document(s) to be available in the processing system.

Note: DFAS can process a typical request in 30 business days if they have all the required information upon submission.

Option 3 – askDFAS, Retiree – Ask a Question

The subjects are limited to the following areas:

- Disability Entitlements

- General / Form / Document
- General Disability Pay
- International Direct Deposit
- Payment Inquiry
- Survivor Benefit Plan
- Verification for Pay Partners

For a full list of Topics/categories visit: [Ask Retired Pay – Online Customer Service](#), answers will be emailed back to the sender.

Using askDFAS “Ask a Question” webpage

- Pick the category and subcategory that best describes the question.
- Fill out required information – note validation question answers must match what is in DFAS.
- You will be asked for a 15-character password/code that has at a minimum:
 - One uppercase letter
 - One lowercase letter
 - One number
 - One special character
- Place your question in the provided field, ensure that pertinent information is included. (If DFAS has additional clarification questions they will be sent to the email provided by you.)
- Select ‘Submit’ - you will get a pop-up window with a reference number and link. This information should also come to the email entered when filling out the online portion.

Note: Keep the password/code available as all correspondence will require you to use it to open the answer ticket.

Note: You will receive an initial reply within three (3) business days.

Note: Failure to answer validation questions will suspend the account for 24 hours, during that time DFAS Cleveland Customer Care Center cannot assist the retiree.

Common requests from retirees with required information and direct link to site:

Change of Address

You will need the following information:

- Social Security Number
- Retired Pay Eligibility Date
- Years of Service
- Branch of Service
- Retirement Rank
- VA Disability Rating
- Monthly State Tax Withholding
- State Designated for Withholding

You will be asked for a 15-character password/code that has at a minimum:

- One uppercase letter
- One lowercase letter
- One number
- One special character

Note: You will receive an initial reply within three (3) business days.

Note: You can also change your address by accessing your myPay account.

Online link – [DFAS Change of Address](#)

Request duplicate 1099-R (tax statement on retirement pay)

Generally, retirees can request a reissue of their 1099-R mid-February for the prior year.

You will need the following information:

- Social Security Number
- Date of Birth for retiree
- Branch of Service
- Date of Retirement
- Pay Grade at Retirement

You will be asked for a 15-character password/code that has at a minimum:

- One uppercase letter
- One lowercase letter
- One number
- One special character

Online link – [DFAS 1099-R Reissue Requests](#)

Request pay verification letter

This request is used to have a letter mailed to your home address reflected in DFAS.

You will need to confirm the address that is currently in DFAS

You will be asked for a 15-character password/code that has at a minimum:

- One uppercase letter
- One lowercase letter
- One number
- One special character

Note: To have this letter sent to an alternate address, use myPay or contact DFAS Cleveland Customer Care Center by phone.

Note: This process will take 7 – 10 business days before it will be placed in the mail.

Online link – [DFAS request verification of pay letter](#)

For a guide to use askDFAS online services see: [askDFAS Reference Guide](#) for more details.

ANNEX C

askDFAS – Online tools for Annuitants

Online Tools for Survivors of Military Retirees Who Passed Away

DFAS has special tools for the family of military retirees who passed away. There is an online form to report the death of a military retiree, as well as two “Ask a Question” tools for beneficiaries. They also have an online upload tool for the SF 1174 Claim Form, to claim a deceased retiree's final pay.

Notification of Retiree Death tool - Use this online form to report the death of a military retiree.

Final Pay of Deceased Member - Questions - Use this Ask a Question tool to ask a GENERAL question about how to claim a deceased retiree's final pay. This includes the Arrears of Pay (AOP) Claim Form - SF 1174 - and supporting documentation.

Starting SBP Annuity Pay – Questions - Use this Ask a Question tool to ask a GENERAL question about starting SBP Annuity pay, such as the process steps and forms/documents required.

SF 1174 – Arrears of Pay (AOP) - Upload - Use this askDFAS Online Upload Tool to submit your SF 1174 form (to claim a deceased retiree's final pay), certificate of death, and other supporting documentation.

askDFAS Online Tools for SBP Annuitants

Did you know DFAS Retired & Annuitant Pay has online tools to make managing your SBP annuity pay account easier?

- Our askDFAS **Self-Serve Tools** allow you to conveniently update your mailing address, request a duplicate 1099-R tax statement, or request verification of pay using an online form.
- Our askDFAS **Online Upload Tools** allow you to simply and securely submit documents to DFAS for processing. Using askDFAS to submit your documents is far superior to mail or fax. Many document uploads will also receive status notifications as they are processed!
- Our askDFAS “Ask a Question” Tools allow you to send a question and get a response via askDFAS.

What Do You Want to Do?

Click On a Link Below to Find a Specific Tool:

[Report the death of an SBP annuitant](#)

[Change my mailing address for my SBP Annuity Pay Account](#)

[Get a duplicate copy of my 1099-R tax statement](#)

[Request a verification of pay letter](#)

[Submit a form or document online](#)

[Submit a question via askDFAS](#)

Didn't Find What You Needed?

[**Check our Quick Tools webpage**](#)

[**Need a form? Go to our Forms Library webpage**](#)

[**Need more assistance? Find out how to contact us**](#)

askDFAS Online SBP Annuitant Change of Address Tool

Use this online tool to quickly and easily request an update to the address on file for your SBP annuity pay account. Fill out the ticket and verification questions and submit your request.

1099-R Online Reissue Tool

Request a duplicate mailed copy of your 1099-R using the IRS's 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 electronically or by mail, no later than January 31 each year – please allow time for the mail to arrive. Requests for reissuance of a 1099-R are available through the above link, usually beginning the second week of February.

Request Verification of Pay

Use this online tool to quickly and easily request a verification of pay letter mailed to your address on file. Your letter should be in the mail within 7-10 business days. If you need a verification of pay letter sent to an alternate address please [**contact our Customer Care Center**](#).

Submit a Form or Document Online

Securely submit documents in a PDF format to DFAS for processing. Click the link below that best fits your form or document. See "How to Submit Documents" below for step-by-step instructions.

General SBP Annuitant Documents - Upload

(Use this tool if the document does not fit one of the specific tools below.)

[**DD 2656-7 – Claim SBP Annuity - Upload***](#)

[**DD 2788 – Child Ann School Cert - Upload***](#)

[**DD 2828 – Child Ann Phys Cert - Upload***](#)

[**DFAS 9415 – Ann Rep Payee Cert - Upload***](#)

[**Power of Attorney/3rd Party Doc - Upload**](#)

[**SBP Annuitant DOHA Appeal - Upload**](#)

[**SBP-Marital Status Update - Upload***](#)

[**Tax Withholding Changes - Upload***](#)

**These form upload tools will send Status Notifications to the email address included on the askDFAS ticket.*

How to Submit Documents Using the askDFAS Online Upload Tools

1-Click on the askDFAS upload tool link that best fits the document (see above).

2-Fill out all applicable information.

3-Read the instructions and click the Confirmation button.

4-Attach your completed and signed documents in PDF format (include name and SSN on each attachment).

5-Scroll to the bottom and select *Upload File(s)*.

6-Select *Submit*.

Note: All documents submitted via an askDFAS online upload tool must be in PDF format; include retiree name and SSN plus SBP annuitant name and SSN on each attachment.

For Form Uploads, it will take up to three business days for your document(s) to be available in DFAS' processing system. DFAS can process a typical request in 30 business days if they have all the required information upon submission.

Submit a Question via askDFAS

Send a question and get a response via askDFAS. See "How to Submit a Question" below for step-by-step instructions.

[Annual Eligibility/School Cert - Questions](#)

[General / Form / Document - Questions](#)

[Payment Inquiry - Questions](#)

[Starting SBP Annuity Pay – Questions](#)

How to Submit a Question Using the askDFAS "Ask a Question" Tool

1-Choose the "SBP Annuitant - Ask a Question" subcategory that most closely matches your question (see above).

2-Fill out all applicable information. If validation questions are present, you must answer correctly for DFAS to respond.

3-Fill in your question. Please be as clear and specific as you can when providing your question.

4-Click "Submit" to send your question to the DFAS Cleveland Customer Care Center. Please remember the passcode you created on the ticket so that you can access it to review the answer.

After you submit your question via one of the tools, expect a response via askDFAS within three business days. You will receive an email alerting you when your ticket has been updated with a response. You'll need to log back in to the ticket to view the response.

Please note tools that are designed for account-specific questions will ask "Validation Questions" that you must answer correctly for DFAS to respond. On such tickets, if the Validation Questions are answered incorrectly, a 24-hour security hold will be placed on the annuitant's account. This means the annuitant must wait until the 24-hour security hold is over to contact the DFAS Cleveland Customer Care Center for more assistance.

Customer Guide to Online Tools

[Click here to get the helpful guide to our online tools and resources](#) for SBP annuitants and retirees.

Online Tools for Survivors of Military Retirees Who Passed Away

We have special tools for the family of military retirees who passed away. There is an online form to report the death of a military retiree, as well as two "Ask a Question" tools for beneficiaries. We also have an online upload tool for the SF 1174 Claim Form, to claim a deceased retiree's final pay.

[Notification of Death tool](#) - Use this online form to report the death of a military retiree.

[Final Pay of Deceased Member - Questions](#) - Use this Ask a Question tool to ask a GENERAL

question about how to claim a deceased retiree's final pay. This includes the Arrears of Pay (AOP) Claim Form - SF 1174 - and supporting documentation.

Starting SBP Annuity Pay – Questions - Use this Ask a Question tool to ask a GENERAL question about starting SBP Annuity pay, such as the process steps and forms/documents required.

SF 1174 – Arrears of Pay (AOP) - Upload* - Use this askDFAS Online Upload Tool to submit your SF 1174 form (to claim a deceased retiree's final pay), certificate of death, and other supporting documentation.

Please see the [Start an SBP Annuity webpage](#) for how-to information and helpful tools for filling out and submitting these documents, including DFAS' helpful Form Wizard. The Form Wizard guides you through completing the form correctly and easily. If you have not yet provided a death certificate that includes the cause or manner of death, please include a copy of this with your documents.

You can [download the entire DD 2656-7 Form Wizard](#) (right click and choose "Save link as...") to your Windows or MAC computer. You will need compatible PDF software, such as the free Adobe Acrobat DC software, available at [adobe.com](#). DFAS does not recommend saving the Form Wizard to a shared computer, because it contains personally-identifiable information. When using Chrome, Edge, Firefox or Safari to access an Adobe form wizard, you may initially receive a pop-up attached message. You must download the pdf (by clicking the download icon in the upper right-hand corner of the page), then double-click on downloaded file. It is suggested to use the form wizard on a personal device. Using the form wizard on a DFAS computer may not have the same functionality a personal device.

ANNEX D

Request Military Personnel Records Using Standard Form 180

Requesters can use the online ordering form at veteranrecs.archives.gov (or use the SF-180).

1. How to Obtain Standard Form 180 (SF-180) to Request Military Service Records

There are several ways to obtain an SF-180. You can:

Download and print a copy of the [SF-180 in PDF format](#).

- You need access to a printer and the Adobe Acrobat Reader software. The form is a total of three pages.
- The SF-180 is formatted for letter size paper (8.5" x 11"). If your printer cannot accommodate this, select *shrink to fit* when the Adobe Acrobat Reader *Print* dialog box appears.
- This is also a fillable version of the SF-180. It will allow you to type the needed information into the form using your keyboard. You will still need to print, sign and mail the form. Otherwise, it works the same as stated above.

Please Note: While Section II, Item 1 of the Standard Form 180 outlines multiple types of records that may be available to the requester, the DD Form 214 is the most common document necessary to obtain most veteran's benefits.

[Download form SF-180 to mail or fax your request.](#)

Where to Return the Form:

Review the tables on page 3 of SF-180 to identify the correct location of the record you need (based on branch of service, dates of separation, and type of record), and send the completed form to the address identified on the table.

Contact to order the form through the mail

- National Personnel Records Center
1 Archives Drive
St. Louis, MO 63138

Other Ways to Obtain the SF-180:

- From the Department of Defense
- From Federal Information Centers
- From [local Veterans Administration offices](#)
- From veteran's service organizations

The SF-180 may be photocopied as needed. Please submit a separate SF-180 for each individual whose records are being requested.

2. Write a Letter to Request Records

If you are not able to obtain a SF-180, you may still submit a request for military records. Requests must contain enough information to allow us to identify the record from among the more than 70 million on file at the National Personnel Records Center (NPRC). For example, if you are requesting an Official Military Personnel File (OMPF), please include as much of the following information as possible:

- The veteran's complete name used while in service
- Service number or social security number
- Branch of service
- Dates of service
- Date and place of birth may also be helpful, especially if the service number is not known
- If the request pertains to a record that may have been involved in the [1973 fire](#), also include:
 - Place of discharge
 - Last unit of assignment
 - Place of entry into the service, if known.

Please submit a separate request (either SF-180 or letter) for each individual whose records are being requested.

Please Note: Next-of-kin (*the un-remarried widow or widower, son, daughter, father, mother, brother or sister of the deceased Veteran*) must provide proof of death of the veteran, such as a copy of the death certificate, a letter from the funeral home or a published obituary.

Additional information is required if you are requesting clinical or medical treatment records (see [Federal Records](#)).

How to Submit Requests:

[Federal law](#) [5 USC 552a(b)] requires that all written requests for Federal (non-archival) records and information be signed (in cursive) and dated (within the last year).

You may submit more than one request per envelope or fax, but please submit a separate request (either SF-180 or letter) for each individual whose records are being requested.

Please Note: While Section II, Item 1 of the Standard Form 180 outlines multiple types of records that may be available to the requester, the DD Form 214 is the most common document necessary to obtain most Veteran's benefits.

- Mail a letter or [Standard Form \(SF\) 180, Request Pertaining to Military Records](#) to:
National Personnel Records Center
1 Archives Drive
St. Louis, MO 63138
- Fax a letter or Standard Form 180 to: 314.801.9195.

The Center will most commonly provide a response electronically (if an email is provided) or in writing by U.S. Mail.

WHAT IS THE DIFFERENCE BETWEEN FEDERAL AND ARCHIVAL RECORDS? [Learn more](#)

Order Processing Time:

Response time for records requested from the [National Personnel Records Center \(NPRC\)](#) varies and is dependent upon the complexity of your request, the availability of records and number of requests received prior to yours.

Please do not send a follow-up request before 90 days have elapsed, as it may cause further delays. While the NRPC works actively to respond to each request in a timely fashion, the Center receives approximately 4,000 - 5,000 requests per day. However, requests that involve reconstruction efforts due to the [1973 Fire](#), or older records which require extensive search efforts, may take longer to complete.

Emergency Requests:

If your request is urgent (e.g. upcoming surgery, funeral, etc.), select Emergency Request in the Veteran Service Details section of [eVeteranrecs](#). Alternatively, you may specify the emergency in the "Purpose" section of the SF-180 and fax it to our Customer Service Team at 314.801.0764. Please contact their customer service staff at 314.801.0800 if you have questions. Due to the large number of calls they receive at this number, hold times are often long. However, once you reach a technician, they will be happy to assist you with emergency service.

If your burial request involves internment at a Department of Veterans Affairs National Cemetery, contact the National Cemetery Scheduling Office at 800.535.1117 or visit their website http://www.cem.va.gov/cem/burial_benefits/. NCRP works directly with the Veterans Affairs staff to obtain records to verify service for burial benefits. If the veteran is not going to be interned at a National Cemetery, the requester may fax the SF-180 (including signature of the next of kin and proof of death) to the Customer Service Team at 314.801.0764.

NOTE: [The 1973 Fire](#) at the National Personnel Records Center damaged or destroyed 16-18 million Army and Air Force records that documented the service history of former military personnel discharged from 1912-1964. Although the information in many of these primary source records was either badly damaged or completely destroyed, often alternate record sources can be used to reconstruct the service of the Veterans impacted by the fire. Sometimes NRPC can reconstruct the service promptly using alternate records that are in their holdings, but other times they must request information from other external agencies for use in records reconstruction. In some instances, therefore, requests that involve reconstruction efforts may take longer to complete.

ANNEX E

Military Awards and Decorations

The National Personnel Records Center (NPRC) does not issue service medals; that is a function of each military service department. Requests for the issuance or replacement of military service medals, decorations and awards should be directed to the specific branch of the military in which the veteran served. However, for cases involving Air Force and Army personnel (click [here](#) for exceptions), the NPRC will verify the awards to which a veteran is entitled and forward the request along with the records verification to the appropriate service department for issuance of the medals. Use the addresses listed below and mail your request accordingly.

How Do I Request Military Awards and Decorations?

For the Veteran: in general, the military services will work replacement medal requests for the Veteran at no cost. This includes family members with the [signed authorization](#) of the Veteran.

For the Next-of-Kin: the process (and cost) for replacement medals requests differs among the service branches and is dependent upon who is requesting the medal, particularly if the request involves an archival record. Click [here](#) for details.

For the General Public: if the service member separated from military service 62 (or more) years ago, the public may [purchase a copy of the Veteran's Official Military Personnel File \(OMPF\)](#) to determine the awards due and obtain the medals from a commercial source. If the service member separated less than 62 years ago, the public may request such information from the OMPF via the Freedom of Information Act ([see Access to OMPFs by the General Public](#)).

Army	Air Force (includes Army Air Corps and Army Air Forces)	Navy
Marine Corps	Coast Guard	Cold War Certificates
ARMY		
Where to write for medals	National Personnel Records Center 1 Archives Drive St. Louis, MO 63138 or	
	REQUEST MEDALS ONLINE!	
Where medals are mailed from	U.S. Army TACOM Clothing and Heraldry (PSID) P.O. Box 57997 Philadelphia, PA 19111-7997	

Where to write in case of a problem or an appeal **U.S. Army Human Resources Command
Soldier Program and Services Division - Awards and
Decorations Branch
ATTN: AHRC-PDP-A
1600 Spearhead Division Avenue, Dept 480
Fort Knox, KY 40122-5408**

AIR FORCE
(includes Army Air Corps & Army Air Forces)

Where to write for medals **National Personnel Records Center
1 Archives Drive
St. Louis, MO 63138 or**

REQUEST MEDALS ONLINE!

Where medals are mailed from, and where to write in case of a problem or an appeal

Active Duty Veterans	Reserve & Air Guard Veterans
Headquarters Air Force Personnel Center HQ AFPC/DP1SP 550 C Street West, Suite 12 Randolph AFB, TX 78150-4714	Air Reserve Personnel Center HQ ARPC/DPTARA 18420 E Silver Creek Ave Bldg 390 MS 68 Buckley AFB, CO 80011

NAVY

Where to write for medals **National Personnel Record Center
1 Archives Drive
St. Louis, MO 63138 or**

REQUEST MEDALS ONLINE!

Where medals are mailed from

**Navy Personnel Command
PERS 312**

AIR FORCE

(includes Army Air Corps & Army Air Forces)

**5751 Honor Drive
Building 769 Room 158
Millington, TN 38055-3120**

Where to write in case of a problem or an appeal **Department of the Navy**
Chief of Naval Operations (DNS-35)
2000 Navy Pentagon
Washington, DC 20350-2000

MARINE CORPS

Where to write for medals **National Personnel Record Center**
1 Archives Drive
St. Louis, MO 63138 or

REQUEST MEDALS ONLINE!

Where medals are mailed from

Navy Personnel Command
PERS 312
5751 Honor Drive
Building 769 Room 158
Millington, TN 38055-3120

Where to write in case of a problem or an appeal **Commandant of the Marine Corps**
Military Awards Branch (MMMA)
2008 Elliot Road
Quantico, VA 22134

COAST GUARD

Where to write for medals, and where medals are mailed from **Coast Guard Personnel Service Center**
4200 Wilson Blvd, Suite 900
(PSC-PSD-MA)
Stop 7200
Arlington, VA 20598-7200

Where to write in case of a problem or an appeal **Commandant U.S. Coast Guard**

MARINE CORPS

Medals and Awards Branch
(PMP-4)
Washington, DC 20593-0001

Important Information for the Next-of-Kin (NOK):

Who is the Next-of-Kin (NOK)?

- For the **Air Force, Navy, Marine Corps & Coast Guard**, the NOK is defined as: *the unremarried widow or widower, son, daughter, father, mother, brother or sister*
- For the **Army**, the NOK is defined as: *the surviving spouse, eldest child, father or mother, eldest sibling or eldest grandchild*

If you do not meet the definition of NOK, you are considered a member of the [general public](#).

How the type of record (archival or non-archival) affects NOK requests for medals:

The Official Military Personnel File (OMPF) is used to verify awards to which a Veteran may be entitled. OMPFs are accessioned into the National Archives, and become archival, 62 years after the service member's separation from the military. Separation from service is defined as discharge, retirement or death in service based on a rolling date. (To calculate this, take the current year and subtract 62.) Records with a discharge date 62 (or more) years ago are archival and are open to the public. Records with a discharge date less than 62 years ago are non-archival and are maintained under the Federal Records Center program. Non-archival records are subject to access restrictions. As such, the Veteran's date of separation (separation is defined as discharge, retirement or death in service) will affect how the request is processed. See below:

NEXT-OF-KIN, MEDAL REQUESTS

Veteran's Separation Date **Army, Navy, and Marine Corps** **Air Force and Coast Guard**

If the Veteran separated from military service 62 (or more) years ago

Requests are accepted at
NO COST
Write to:
National Personnel Records Center
1 Archives Drive
St. Louis, MO 63138 or
Or
[**REQUEST MEDALS ONLINE!**](#)

These Services do not accept NOK archival requests. The NOK may [purchase a copy of the Veteran's OMPF](#) to determine the awards due and obtain the medals from a commercial source

NEXT-OF-KIN, MEDAL REQUESTS

If the Veteran separated from military service less than 62 years ago	Requests are accepted at NO COST Write to: National Personnel Records Center 1 Archives Drive St. Louis, MO 63138 or Or REQUEST MEDALS ONLINE!	Requests are accepted at NO COST Write to: National Personnel Records Center 1 Archives Drive St. Louis, MO 63138 or Or REQUEST MEDALS ONLINE!
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WHAT MAKES A RECORD ARCHIVAL? [Learn more](#)

Cold War Recognition Certificate:

In accordance with section 1084 of the Fiscal Year 1998 National Defense Authorization Act, the Secretary of Defense approved awarding Cold War Recognition Certificates to all members of the armed forces and qualified federal government civilian personnel who faithfully served the United States during the Cold War era from September 2, 1945, to December 26, 1991.

What Service does the NRPC Provide?

The NRPC, upon request, will provide copies of [DD-214s](#) (or equivalent) or SF-50s to authorized requesters. These documents may be used to apply for the Certificate. For information on how to obtain a copy of your DD-214 (for military service personnel) or [SF-50](#) (for Federal civilian personnel) see:

MILITARY PERSONNEL RECORDS

If the Veteran separated from military service 62 (or more) years ago:

[CLICK HERE](#)

If the Veteran separated from military service less than 62 years ago:

[CLICK HERE](#)

How Do I Apply for a Cold War Recognition Certificate?

While the NRPC provides proof of service and separation documents; the Center does not supply the Certificate itself, nor does it have the application form available. For more information concerning the application process, search the Internet for "[Cold War Certificate Program - HRC Homepage](#)".

ANNEX F

Form Number	Form Name & Link
DoD Form Website	Find a DoD Form
GSA Form Website	Find a GSA Form
IRS Form Website	Find a IRS Form
SSA Form Website	Find a SSA Form
VA Form Website	Find a VA Form
DD 2656-6	Survivor Benefit Plan Election Change Certificate - Form Wizard
DD 2656-6	Survivor Benefit Plan Election Change Certificate - PDF
DD 2656-7	Verification for Survivor Annuity - Form Wizard
DD 2656-7	Verification for Survivor Annuity - PDF Download
DFAS-Cl Form 1059	Direct Deposit Authorization - PDF
IDHW Form	Certificate Request Form - Death
IRS Form 1040	U.S. Individual Tax Return
IRS Form 1040-SR	U.S. Tax Return for Seniors
IRS Form 1310	Statement of a Person Claiming Refund Due a Deceased Taxpayer
IRS Form 2848	Power of Attorney and Declaration of Representative
IRS Form 4506-T	Request for Transcript of Tax Return
IRS Form 56	Notice Concerning Fiduciary Relationship (for estate executors)
IRS W4P	IRS Withholding Certificate for Pension or Annuity Payments - PDF
SF 1174	Claim for Unpaid Compensation of Decesased Member of the Uniformed Service - Form Wizard
SF 1174	Claim for Unpaid Compensation of Decesased Member of the Uniformed Service - PDF
SSA-3368-BK	Disability Report - Adult
SSA-827	Authorization to Disclose Information to the Social Security Administration
Standard Form (SF) 180	Request Pertaining to Military Records
VA Form 21-0779	Request for Nursing Home Information in Connection with Claim for Aid and Attendance
VA Form 21-22	Appointment of Veterans Service Organizaiont as Claimant's Representative - PDF
VA Form 21-22a	Appointment of Individual as Claimant's Representative - PDF
VA Form 21-2680	Examination for Housebound Status or Permanent Need for Regular Aid and Attendance
VA Form 21-4142	Authorization to Disclose Information to the Department of Veterans Affairs (VA)
VA Form 21-4142a	General Release for Medical Provider Information to the Department of Veterans Affairs (VA)
VA Form 21P-530EZ	Application for Burial Benefits - PDF
VA Form 21P-534EZ	Application for DIC, Survivors Pension, and/or Accrued Benefits - PDF
VA Form 40-10007	Application for Pre-Need Determination of Eligibility for Burial in a VA National Cemetery

ANNEX G

Veteran Service Organizations

The following organizations have Veteran Service Officers (VSOs) who can assist you in submitting a claim with the VA. These VSOs are free for Veterans and their families to use.

Disabled American Veterans

DAV Local Office Finder Website: <https://www.dav.org/find-your-local-office/>

Customer Support Number: 208.429.2140

VA Regional Office

444 W. Fort St., Rm 143

Boise, ID 83702

Idaho Department of Veterans Services (IDVS)

IDVS Website: <https://Veterans.idaho.gov/>

Customer Support Number: 208.780.1300

Central Support Office

351 Collins Rd,

Boise, ID 83702

Main Office

Customer Support Number: 208.780.1380

VA Regional Office

444 W. Fort St.

Boise, ID 83702

List of IDVS VSOs around the state: <https://Veterans.idaho.gov/advocacy/service-officers/>

ANNEX H

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