

Finance Separation/Retirement Packet

Name: _____ Grade: _____ SSN: _____
(Last, First, MI)

If retiring, DOS is date orders state you are relieved of active duty.

If separating, DOS is the date in block 13 of orders.

DOS: _____ Final-Out Date: _____

- If going AGR please check off YES NO (in order to not sell back your leave if transferring over please let us know)
- In order to complete your out-processing with finance, please completely fill out this packet and ensure any terminal and/or permissive leave you are taking is approved by your commander. We will be able to finish you out-processing with finance once we have a copy of your orders, your leave is approved and we have your completed packet.
- The best way to contact finance is through the Comptroller Services Portal (CSP). When you send this packet back to finance, please send it in an inquiry at:
<https://usaf.dps.mil/teams/SAFFMCSP/portal/SitePages/Home.aspx>
This is the best way to communicate with finance because the entire finance office will have access to see the case. It also keeps all documents uploaded for the separation in the same spot.
- If you are doing skillbridge, permissive, and/or terminal leave, please send this packet back to us after your leave has been approved by your commander. We will NOT be able to finish your out processing until your leave has been input, concurred, and approved. We will authorize your leave, but we cannot do this until the leave has been approved.
- If you are taking terminal leave, this leave will always be last. If you are doing skillbridge, permissive AND terminal leave (all three of them): the order they will be done in will be: skillbridge, permissive (permissive, skillbridge), then terminal.
- If you move out of the local area during your skillbridge, permissive, or terminal leave, you will still receive BAH for the Luke AFB, AZ rate during this time through your DOS.
- If you choose to take terminal leave, please ensure your last day of terminal leave is your last day of duty.
- If your leave is too far out to be input into Leaveweb (only allows 60 days out from start date) you will have to complete a 988 Leave request form and have it signed by your commander, once approved please provide it to us so we can assign a leave authorization number to it.
- Once all out-processing tasks are completed you will be signed off in vMPF, have leave forms (988s) with authorization #s, a final packet to include travel voucher (if you do decide to relocate), and a memo personnel flight might need for your out-processing.

APPLICATION & AUTHORIZATION TO START, STOP OR CHANGE BASIC ALLOWANCE FOR HOUSING OR RECERTIFICATION OR DEPENDENCY DETERMINATION/REDETERMINATION OR ESM START/STOP FOR MEMBERS ASSIGNED/TERMINATING UNACCOMPANIED PERSONNEL HOUSING

PRIVACY ACT STATEMENT

AUTHORITY: 37 USC 403, Public Law 96-343, EQ 9397

PURPOSE: To start, adjust or terminate military member's entitlement to BAH or to provide required Entitlement Recertification or Dependency Determination/Redetermination or ESM start/stop for eligible members E6 and below assigned/terminating unaccompanied personnel housing.

ROUTINE USE(S): Information may be disclosed to the Internal Revenue Service for tax information on members Social Security Administration or information on tax deducted, Department of Veteran Affairs for education and group life insurance information, and the Department of Justice for investigating or prosecuting possible violations of the law, the American Red Cross for information concerning the needs of the member or dependents emergency situations, the Air Force to determine needs of a member or dependents in emergency situations and for verification of loan applications, state and local governments for tax and welfare insurance companies for allotment information and financial institutions, for deposits and/or payments.

DISCLOSURE: Voluntary. However, failure to provide all information including Social Security Number (SSN) may result in nonpayment of BAH

PART A - IDENTIFICATION & DUTY LOCATION

1. NAME (Last, First, MI)

2. SSN

3. GRADE

4. PHONE

5A. DUTY LOCATION (Base, State, ZIP Code or Country)

Luke AFB, AZ 85309

5B. E-MAIL ADDRESS

LODGING OFFICIAL

NON-AVAILABILITY/ASSIGNMENT/TERMINATION OF QUARTERS

QUARTERS ARE NOT ASSIGNED ☐ DATE:

ADEQUATE QUARTERS ☐ ASSIGNED ☐ TERMINATED
EFFECTIVE DATE: UNIT #

INADEQUATE QUARTERS ☐ ASSIGNED ☐ TERMINATED
EFFECTIVE DATE: UNIT #

TRANSIENT QUARTERS OCCUPIED - UNIT #

EFFECTIVE DATES FROM:

TO:

PART B - MARITAL/DEPENDENT STATUS

6 ☐ SINGLE, NO DEPENDENTS ☐ SINGLE, CLAIMING DEPENDENT(S)

MARRIED - SPOUSE IS A ☐ CIVILIAN ☐ MILITARY MEMBER

IF MILITARY SPOUSE - NAME, SSN, BRANCH OF SERVICE, STATION AND DATE OF MARRIAGE:

☐ DIVORCED (Date) ☐ LEGALLY SEPARATED (Date)

TITLE

SIGNATURE

DATE

7. NON-CUSTODIAL PARENTS: I PAY ☐ THE FULL AMOUNT OF WITH-DEPENDENT RATE BAH, OR ☐ \$.00 PER MONTH FOR DEPENDENT SUPPORT

BASED ON: a. ☐ DIVORCE DECREE b. ☐ COURT ORDER c. ☐ LEGAL SEPARATION AGREEMENT, OR d. ☐ WRITTEN AGREEMENT WITH CHILD'S CUSTODIAN

8. I ☐ CLAIM BAH FOR THE DEPENDENT ☐ IN ☐ NOT IN MY LEGAL AND PHYSICAL CUSTODY LISTED BELOW (Effective Date):

Note: Indicate the civilian dependent(s) you are claiming and the relationship (i.e., spouse, minor child, incapacitated child, stepchild or parent). For other than spouse or minor child, see list of potential dependents in Part C below. If dependent(s) is a child, include the date of birth(DOB).

(a) NAME (Last, First, MI)	(b) ADDRESS, CITY, STATE, ZIP or COUNTRY	(c) RELATIONSHIP	(d) DOB

9. IF DEPENDENT NAMED ABOVE IS A CHILD WHOSE PARENT IS A MILITARY MEMBER OR THE SPOUSE OF A MEMBER PROVIDE THE FOLLOWING

NAME	SSN	BRANCH OF SERVICE	STATION

PART C - MEMBER'S CERTIFICATION (For members with dependents)

☒ I certify that I provide adequate support (see AFI 36-2906 and JFTR ch 10) for the dependents named above. I am aware that failure to adequately support the above named dependents will result in stopping BAH, and recouping allowances paid for any prior periods of nonsupport

CERTIFICATION FOR MEMBERS RECEIVING BAH FOR SECONDARY DEPENDENTS (package must be sent to DFAS-IN for determination).

(Parents, parents-in-law, stepparents, parents-by-adoption, or in-loco-parentis, Students 21 and 22 years of age, Incapacitated children over age 21, or Ward of a court).

I certify that this is my first application ☐ YES ☐ NO If no, give date your last application was filed.

I understand that my failure to comply with the applicable requirements may result in cancellation of my BAH. Furthermore, I understand that making a false statement or claim against the US Government is punishable by court martial and that the penalty for willfully making a false claim, or false statement in connection with a claim is a maximum fine of \$10,000 or imprisonment for 5 years, or both. I will report any changes of dependent's status or residence, as well as any changes in my housing arrangements immediately to the Financial Services Office (FSO). I also understand that my failure to comply with appropriate requirements may cause involuntary collection of any resulting indebtedness retroactive to the date the entitlement became erroneous.

MEMBER'S SIGNATURE

DATE

ADDITIONAL INFORMATION

OFFICIAL USE ONLY - FINANCE

☐ START
 ☐ CHANGE
 ☐ CANCEL
 ☐ REPORT
 ☐ STOP
 ☐ PARTIAL
 ☐ WITHOUT DEPENDENT
 ☐ WITH DEPENDENT

PRIMARY DEPENDENT CERTIFICATION: I have determined that the above named individual is dependent on the member based on being

☐ Spouse
 ☐ Single member claiming legitimate child in custody of another
 ☐ Legitimate child in single member's custody
 ☐ Stepchild
 ☐ Adopted Child
 ☐ Illegitimate child or
 ☐ Child, member to member marriage

SECONDARY DEPENDENT DETERMINATION/REDETERMINATION

☐ Parents
 ☐ Parents-in-law
 ☐ Stepparents
 ☐ Parents-by-adoption
 ☐ In-Loco-Parentis
 ☐ Students 21 and 22 years of age
 ☐ Incapacitated children over age 21
 ☐ Ward of a court

☐ I have determined that the above named individual is not dependent on member or eligible to be a dependent of member. Reasons for disapproval are noted here

☐ I have verified that member is E-7 or above and there is no military necessity that requires the member to reside on base

TITLE OF CERTIFYING OFFICIAL

SIGNATURE

OFFICE ADDRESS

DATE

Terminal and/or Permissive Leave Member is Planning to Take

Name:	Date of Separation:	Grade:
Final-Out Date:	SSN:	Unit:

Please check which of these two statements is true for you

____ I am planning to take terminal and/or permissive leave. (Please fill out the table below).

____ I am not planning to take terminal and/or permissive leave. (Leave the table below blank).

What leave are you going to take?

Leave Type	Start Date	End Date	# of Days
Skillbridge			
Permissive			
Terminal <small>Last day of terminal is the last day of duty (DOS)</small>			

Leave Days Accrued @ DOS

Amount of Terminal Leave Being Taken

Number of Leave Days Being Sold Back

- Leave not taken will be automatically sold back on your final paycheck. However, the maximum number of leave days to sell back is 60.
- You will continue to receive the local BAH rate through your DOS even if you relocate while on your final leave.
- All members retiring are authorized permissive TDY.
- The only separatees eligible for PTDY are voluntary separation incentive, special separation benefits and involuntary separatee.
- Permissive TDY is only used for house and/or job search per AFI 36-3003, Table 3.6, Rule 2. A member is authorized up to twenty days of permissive TDY for CONUS members and up to thirty days is authorized for overseas retirees.
- If you are taking terminal and/or permissive leave, finance CANNOT complete your out-processing without your commander approving your leave first.
- For terminal and permissive leave, in leaveWeb, the leave is first input by the member, then concurred by the member's leadership, then approved by the member's commander, then the last step will be finance authorizing the leave. This cannot be done without the leave being approved first.
- If you are not authorized permissive leave IAW AFI 36-3003 or AFI 36-3205, then please do not request permissive leave.
- You do not have to take all of your leave. You are able to sell back up to 60 days. You do not need to do anything to sell this back. It will automatically be on your final paycheck.
- For leave sell back, the daily rate is determined by dividing your Base Pay by 30 days. Leave sell is taxed at 25% for federal tax. If you pay state taxes you will be taxed based on the one time entitlement percentage for your state.
- Final out date is generally the duty day before beginning terminal, permissive, or skillbridge.
- You are unable to take half days of leave. If you happen to have a half day left over, this will automatically be sold back on your final paycheck.
- All Permissive and Terminal Leave requests are processed and approved in LeaveWeb before departure. G Series Commander approved, finance authorized.
- Permissive leave will be done under "Type T, Rule 2" to be correctly routed in LeaveWeb.
- If you are authorized Permissive leave and are taking any portion of your Permissive leave in conjunction with Terminal Leave, please check the box "In conjunction with Terminal Leave" when inputting the leave into LeaveWeb.
- Leave numbers will be assigned after all leave is approved and final out documents are returned to the Finance office.

Sign: _____

Date: _____

Retirement/Separation Handout

W-2/1099R

- Since tax documents are no longer mailed, you must use myPay to generate your W-2 or 1099R after you have retired/separated. For separating members, your MyPay account will remain active a year after you separate so you can access your tax documents. Please ensure you know your userid/password because you will have to go into a Finance Office to reset the password. Over the phone password resets are not allowed.

Final Active Duty Paycheck

- Your final active duty pay will NOT pay out at the usual 1st or 15th of the month. It will pay out 10 - 14 days after your date of separation. This payment will include any pay you have not received yet. It will also include any sell back of unused leave.

Leave Sell

- Leave sell happens automatically on your DOS.
- Any leave remaining on your Pay Record at your DOS is automatically sold.
- You are limited to selling 60 days in a career.
- The daily rate is determined by dividing your Base Pay by 30 days. Leave sell is taxed at 25% for federal tax. If you pay state taxes you will be taxed based on the one time entitlement percentage for your state.

Retired Pay

- Retired pay is handled by DFAS-Cleveland. **All retirement pay questions must go through DFAS. Base level finance does not have any access for retired pay.**
 - DFAS-Cleveland customer service number is 1-800-321-1080.
- You will be able to access/change your retired pay through myPay (mypay.dfas.mil).
- A retired pay estimate can be obtained via the AFPC Retired Pay Calculator located at: <http://www.dfas.mil/retiredmilitary/plan/estimate.html>
- You should ensure that you have created a myPay pin and password so that you can access your final LES, W-2, and 1099-Rs.

BAH

- You will continue to receive the local BAH rate through your DOS even if you relocate while on your final leave.
- If you are mil-to-mil, your spouse will need to update their BAH with their servicing finance office to claim you as a civilian dependent. They will need to provide their servicing finance with an AF 594, your DD 214, and a copy of your marriage certificate.

Permissive TDY

- All members retiring are authorized permissive TDY.
- The only separatees eligible for PTDY are voluntary separation incentive, special separation benefits and involuntary separatee.
- Permissive TDY is only used for house and/or job search per AFI 36-3003, Table 3.6, Rule 2. A member is authorized up to twenty days of permissive TDY for CONUS members and up to thirty days is authorized for overseas retirees.

Travel After Your Final-Out Date

- If you travel before the date your terminal leave, permissive TDY start date, or separation date, whichever is earlier, Military Pay may charge you leave which could result in an excess leave balance and create a debt.

TMO

- **All documents for your household goods move must go through TMO.** Finance **cannot** file vouchers for household goods. Weight tickets cannot be claimed on a travel voucher through finance.
- PPM travel vouchers **cannot** be claimed through finance.

AGR

- **If AGR and transferring Leave please let us know so we do NOT sell back Leave upon final payment.**