

FERS RETIREMENT CODE ERRORS

WAIVER GUIDE

Defense Finance and Accounting Service - July 31, 2022

Revised by DCPAS on 03/21/23 - Adapted for Agency-wide Use

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Background

In December 2021, Department of Navy discovered a number of civilian employees were potentially placed in the wrong Federal Employee Retirement System (FERS) plan. There are three different FERS plans with differing employee contribution rates: FERS, FERS - Revised Annuity Employees (FERS-RAE), and FERS – Further Revised Annuity Employees (FERS-FRAE). FERS requires an employee contribution rate of 0.8% of basic pay and generally covers employees appointed on 1 January 1984 through 31 December 2012. FERS-RAE requires an employee contribution rate of 3.1% of basic pay and covers employees appointed on 1 January 2013 through 31 December 2013. Finally, FERS-FRAE requires an employee contribution rate of 4.4% of basic pay and covers employees appointed on 1 January 2014 to present.

A subsequent audit has found some federal employees serviced by your Component are also in the wrong FERS retirement system. You are receiving this guide because you are included in this group. A thorough review of the identified personnel files confirmed some personnel files contained retirement coding errors causing the employees to be placed in the wrong FERS retirement plan. In the majority of instances, the error caused underpayment of FERS retirement contributions and overpayment of salary, resulting in an employee debt to the government.

Title 5 of the Code of Federal Regulations (C.F.R.) Section 841.505(d) states any portion of the payment to the FERS retirement fund which should have been deducted, but was not, from employee basic pay constitutes an overpayment of pay, subject to collection by the agency from the employee unless waived under applicable authority.

To give impacted employees awareness of the unavoidable decrease in take-home pay that would occur upon correction of the error, your Component HRO is providing this notification. These corrections were provided to DFAS Civilian Pay Offices for further processing. DFAS Civilian Pay Offices are reviewing payroll records, correcting retirement codes, determining over-payments and issuing debt notification letters to affected employees.

DFAS will begin sending debt notification letters as each case is reviewed and debt amounts are established. This process is anticipated to take several months.

The employee's receipt of the debt notification letter is the triggering event for the employee's exercise of options concerning debt management. Employees have one of three options: 1) to repay the debt; 2) file a request for waiver of the debt; or, 3) file a hearing request to contest the validity or amount of the debt.

Overview

Generally, persons who receive a payment erroneously from the Government acquire no right to the money, and they are required to make restitution. If a benefit is bestowed by mistake, no matter how careless the act of the Government may have been, the recipient must make restitution. In theory, restitution results in no loss to the recipient because the recipient received something for nothing. However, Title 5 of the United States Code (U.S.C.) Section 5584 provides authority to waive, under certain conditions, debts individuals owe the Government that are the result of erroneous payments of pay and allowances. A waiver is not a matter of right. It is available to provide relief as a matter of equity, if the circumstances warrant. Pursuant to 5 U.S.C. 5584, waivers may be granted only if the authorized official determines that collection of the debt would be against equity and good conscience and not in the best interests of the United States. Generally, this standard is met if there is no indication of fraud, misrepresentation or lack of good faith on the part of the employee. A waiver is normally precluded if the employee knew or had reason to know that an erroneous payment occurred.

The amount of the employee's debt determines who has waiver authority. The DoD waiver approval authority for debts \$1,500 and under is the Director of DFAS-Indianapolis. For debts over \$1,500, the DoD waiver approval authority is the Director of the Defense Office of Hearings and Appeals (DOHA). However, all waivers are initially routed through DFAS regardless of which office holds the waiver approval authority.

This Waiver Guide was developed to assist you with filling out your waiver application and assembling your waiver package. Your Component HRO is also available to assist with questions, obtaining supporting documentation, and reviewing packages for completeness. Contact your Component HRO for additional information.

Building the Waiver Package

Step 1 – Filling Out the Waiver Application Form (DD Form 2789)

Employees have two options for filling out the DD-2789. Go to the DFAS website at <https://www.dfas.mil/waiversandremissions/civilianwaivers/> and you will see that you have the option to download a fillable PDF DD Form 2789, or you may use the DD-2789 Smart Form.

We **highly recommend** using the Smart Form because it is easier to fill out, and walks you all the way through the form to completion.

The screenshot shows the DFAS website interface. At the top, there is a search bar and a 'myPay' button. Below the navigation menu, the page is titled 'Current or Former Civilian Employees'. The main content area contains the following text:

Current or Former Civilian Employees
A waiver is an act of the government to intentionally relinquish its claim against an individual for a debt resulting from erroneous payments of wages or allowances. Financial hardship is not a consideration for waiver. Civilian claimants must submit a waiver application to DFAS within 3 years of the date the debt was discovered by a pay official.

Civilian employees are not eligible for Remission because their debt was not incurred while on active duty military orders.

How to submit
You may request a waiver by completing the [DD Form 2789 \(PDF\)](#) or [DD2797 \(smart form\)](#) Remission/ Waiver of Indebtedness Application. To be eligible for waiver you must submit your waiver request within 3 years from the date the debt was discovered by an appropriate official.

To apply for a waiver you must:

- Have a debt established on your pay account.
- Submit your application to your civilian payroll office within 3 years of the date the debt was discovered by a pay official.
- Agree to the validity of the debt. If you dispute the debt, you can ask your servicing finance or payroll office to conduct an audit before you proceed with the application process. Former employees must contact the Civilian Payroll Office at 800-729-3277 to request an audit. You can pursue a waiver once your audit is complete. Please ensure that you attach the results of your audit, and a statement acknowledging the validity of the debt, with the waiver application.

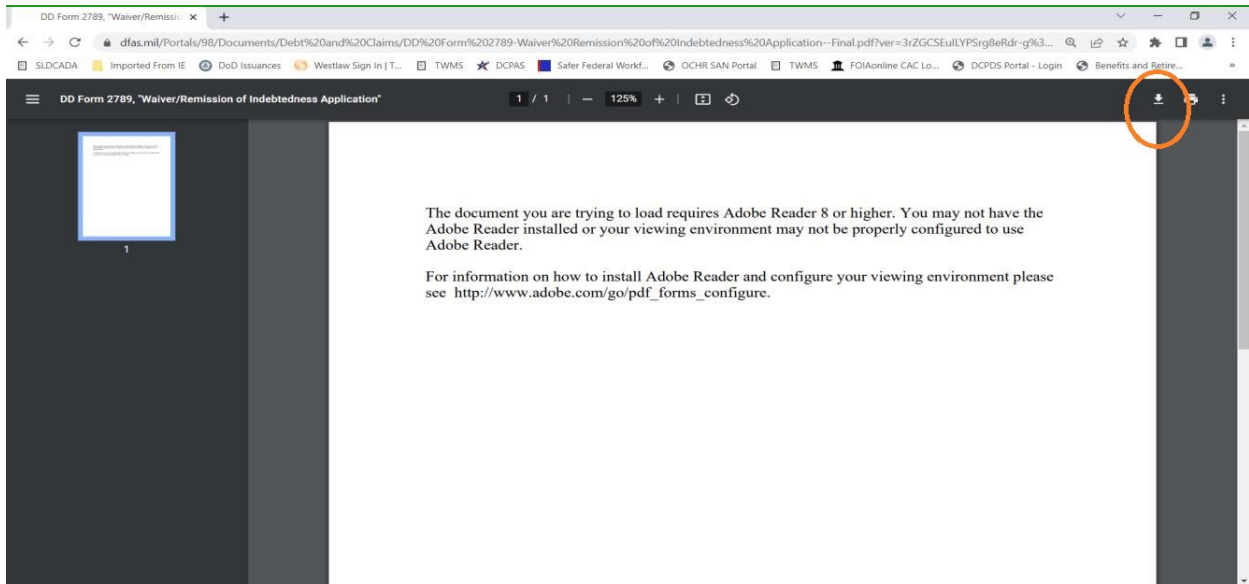
Active and former civilian employees must complete the first page of the [DD Form 2789 \(fillable PDF\)](#) or [DD 2789 \(smart form\)](#). Once complete, submit the application to the address listed on the debt notification letter.

If you did not receive a debt notification letter, you may call the Civilian Payroll Office for a copy at 800-729-3277.

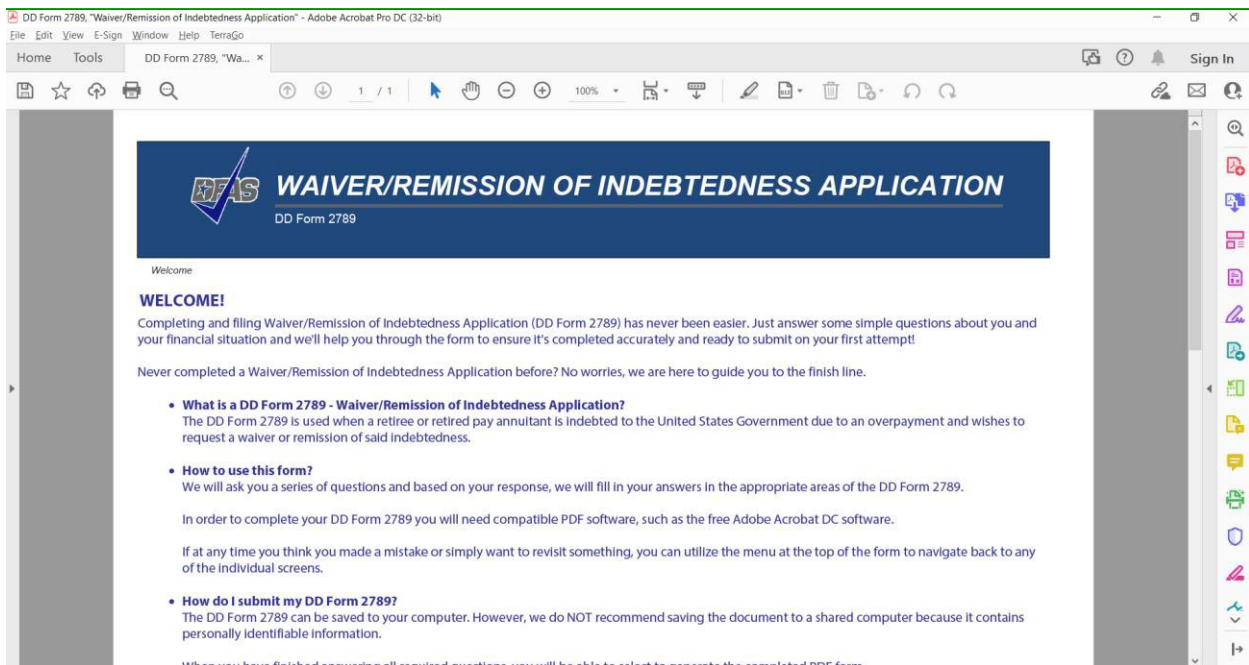
Documents you should include with your application:

Option 1: Download a fillable PDF version of the DD Form 2789 by clicking on the **second link** to the DD Form 2789 (fillable PDF), towards the bottom of the How to Submit Section of the page (circled below in **blue**); OR,

Option 2: Download the DD-2789 Smart Form by clicking the smart form link (circled above in **black**). We highly recommend using this option for your waiver application. When you click on the link to the Smart Form, you may receive the following message:



Do not worry about it! Click the download button (the downward pointing arrow) near the top right corner of the document circled above. You will be asked to save the file to your computer, save the downloaded file on your computer wherever you like. After you save the file, a PDF form icon will appear at the bottom left corner of your screen. **DO NOT** click the icon – it will take you back to the same Adobe Reader 8 message you see above. Close the webpage, then go to where you saved the smart form on your computer. Double click the Smart Form to open it and below is what you should see:



Whether you choose Option 1 (fillable PDF) or Option 2 (Smart Form), you are now ready to fill out your waiver application. Both options require you to provide the same information, but the questions will appear in slightly different order.

If you don't know how to answer a particular question, Appendix A of this Guide contains a complete copy of the DD-2789 fillable PDF form (including the instructions).

In addition to the instructions contained in **Appendix A**, below is some general guidance to assist you in filling out Section I of the DD-2789 waiver application form.

Waiver Application Form - Section I:

- Type of Claim: Waiver
- Rank/Grade: Current GS Grade or Equivalent
- Status at the Time of Debt: For current employees, status is "DoD Civilian".
- SCD: For current employees, the SCD is the **Civilian SCD**. Note, this is NOT the SCD reflected in Block 31 on your SF-50. The SCD reflected on the SF-50 is your SCD Leave date. You must use the SCD Civilian date for your waiver application. You can find your SCD Civilian date by logging into MyBiz at <https://compo.dcpds.cpmc.osd.mil/>. When the home page opens, scroll down to the "Detail Pages" section at the bottom of the page and click on the purple box titled "Personal." From the menu, select Service Computation Date Information.
- There you will see your SCD Civilian date; use this date for your waiver application form.
- Mailing address, e-mail, home phone: It may take over a year for DFAS/DOHA to issue a decision on your waiver application. Make sure you use mailing addresses, phone numbers and e-mail addresses that are most likely to be accurate and still in use a year from now.
- Place of Assignment: Name and address of your current command
- Type of Debt or Erroneous Payment: Erroneous overpayment of salary due to FERS retirement coding error.
- Reason for Requesting a Waiver: When writing your statement, you are advised to keep in mind the standards for granting a waiver. The standards for considering waiver are outlined in 5 U.S.C. §5584 and DoDI 1340.23, Enclosure 4, which are posted online at [5 U.S. Code § 5584 - Claims for overpayment of pay and allowances, and of travel, transportation and relocation expenses and allowances | U.S. Code | US Law | LII / Legal Information Institute \(cornell.edu\)](#) and <https://www.esd.whs.mil/Portals/54/Documents/DD/issuances/dodi/134023p.pdf> respectively.
- Key considerations are:
 - Waivers will not be granted if there is any indication of fraud, misrepresentation fault, or lack of good faith on the part of the employee.
 - A waiver is generally precluded if the employee knew or reasonably should have known that an erroneous payment occurred (i.e. an unexplained significant increase in pay).

- The fact that an erroneous payment is solely the result of an administrative error or mistake on the part of the Government is not sufficient basis in and of itself for granting a waiver.
- HRO POC: Contact the individual at your HRO identified in your notification memo.
- Employee Signature: **Employees must sign the waiver application form using either their CAC digital signature, or by physically signing the form using their handwritten “wet” signature.** No electronic signatures, other than CAC digital signatures, will be accepted.

Waiver Application Form - Section II:

- 1) Employees are NOT responsible for completing Section II of the waiver application. DFAS will complete Section II.

Step 2 – Gather Required Supporting Documents

All waiver applications must be accompanied by supporting documentation. At a minimum, your waiver package is required to include the following documents:

1. **Completed and signed** Waiver/Remission of Indebtedness Application DD Form 2789. Again, the form must be signed using either a CAC digital signature, or by physically signing the form using a handwritten “wet” signature.
2. Notification Letter you received from your HRO, and any other notices you may have received notifying you about an error in your retirement code.
3. DFAS Debt Notification Letter
4. Standard Form 50s (SF-50s): Copies of all SF-50s issued during the entire debt period. Also include at least one (1) SF-50 *BEFORE* the error occurred (if any). You must also include the correction SF-50 correcting Block 30 of your SF-50 (moving you to the correct retirement plan), and one SF-50 *AFTER* the error correction (if any). Employees may access their SF-50s in one of three ways:
 - a. By logging into MyBiz at:
<https://compo.dcpds.cpms.osd.mil/rsouiportal/AccessRegions.jsf>; or
 - b. By logging into eOPF (contact your HRO for information on how to access and use eOPF). Employees who have established an eOPF account are encouraged to review **Appendix B**, which contains instructions for easy download of all or part of an eOPF in one batch.
 - c. If the retirement code error occurred upon your *initial appointment* to Federal service, you do not have SF-50s from before the error occurred. If this applies to you, you will need to provide a statement explaining why you have no SF-50s to provide for the time period before the error. See the sample statement provided at **Appendix C**.

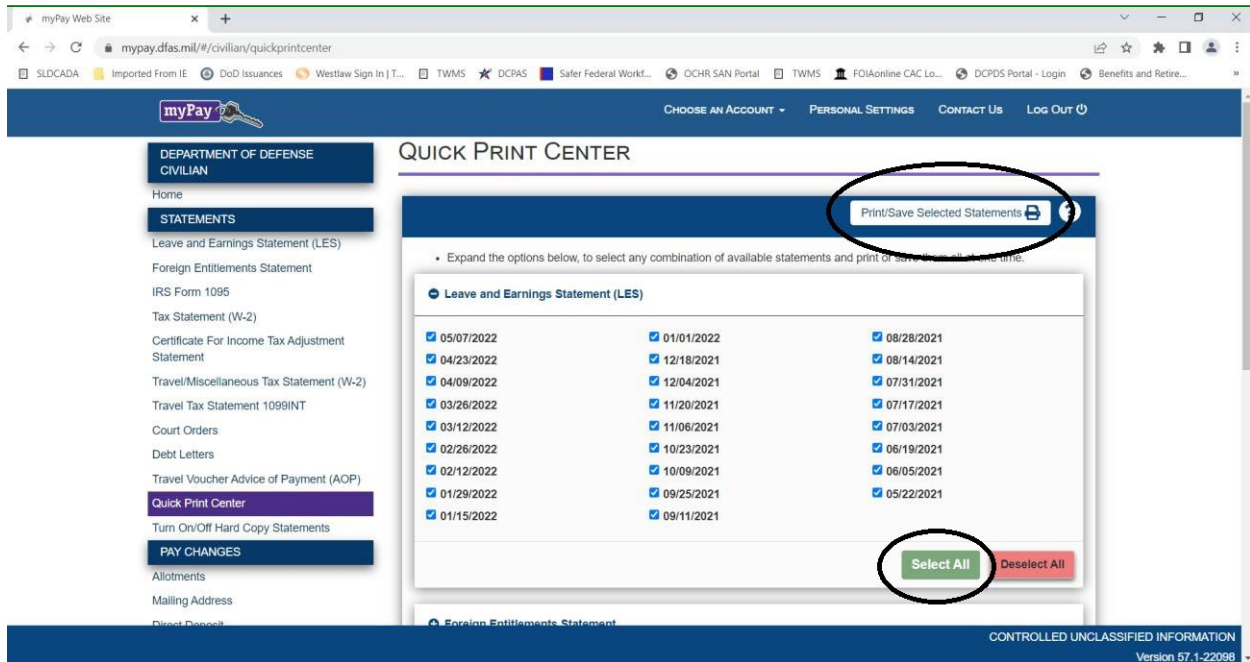
5. Leave and Earning Statements (LES): Copies of all LESs issued during the entire debt period. You must also include three (3) LESs *BEFORE* the error occurred (if any), and three (3) LESs *AFTER* the correction to your retirement code was made (the deductions section of the LESs will show the retirement plan and code)

Employees are **REQUIRED** to provide copies of all relevant LESs available in myPay. Employees may download their LESs by logging into the myPay website at <https://mypay.dfas.mil/#/>.

On the left side of the home page, go to the “Statements” menu and select “Quick Print Center” (circled below).

The screenshot shows the myPay website interface. At the top, there is a navigation bar with the myPay logo and links for 'CHOOSE AN ACCOUNT', 'PERSONAL SETTINGS', 'CONTACT US', and 'LOG OUT'. Below this, the page title is 'DEPARTMENT OF DEFENSE CIVILIAN'. A message indicates the account was last accessed on May 24, 2022. A 'WARNING' box is present, stating: '18 U.S.C. § 1030 prohibits unauthorized or fraudulent access to government computer systems. If the credentials you enter are not your own, you are in violation of this law and should exit this system immediately. Completing this action may subject you to a fine of up to \$5,000 or double the value of anything obtained via this unauthorized access, plus up to five years imprisonment.' The left navigation menu includes 'Home', 'STATEMENTS', 'Leave and Earnings Statement (LES)', 'Foreign Entitlements Statement', 'IRS Form 1095', 'Tax Statement (W-2)', 'Certificate For Income Tax Adjustment Statement', 'Travel/Miscellaneous Tax Statement (W-2)', 'Travel Tax Statement 1099INT', 'Court Orders', 'Debt Letters', 'Travel Voucher Advice of Payment (AOP)', 'Quick Print Center' (circled in purple), 'Turn On/Off Hard Copy Statements', and 'PAY CHANGES'. The bottom right corner of the page contains the text 'CONTROLLED UNCLASSIFIED INFORMATION' and 'Version 57.1.22098'.

Next, click on Leave and Earning Statement (LES). A box will open listing all the LESs available for download, click the “select all” button at the bottom right of the screen, then go up to the top of the box and select “print/save selected statements”.



A PDF containing all your LESs will open. Click the download button (the downward pointing arrow) near the top right corner of the document. You will be asked to save the file to your computer, save the downloaded file on your computer wherever you like.

- a) **Your waiver package must include ALL LESs in your possession that are within the debt period.** If you save your LESs, you are expected to include all LESs in your possession that fall within the debt period in your waiver package.
 - b) **LES documents available on myPay only go back 1 year (26 pay periods).** Employees who do not have copies of their older LESs are required to provide a statement explaining why your package is missing your older LESs. A sample statement is provided at **Appendix C**. DFAS will retrieve any missing historical pay records that are over one year old and will add them to your waiver application package.
 - c) If the retirement code error occurred upon your **initial appointment** to Federal service, you do not have LESs from before the error occurred. If this applies to you, you will need to provide a statement explaining why you have no LESs. See the sample statement provided at **Appendix C**.
7. Employees must provide a statement as to why you are requesting a waiver and why you think it should be approved. See the sample statement provided at **Appendix C**.
 8. Employees must include any other documents they make reference to in their Waiver Application form DD-2789.
 9. If an employee states in their Waiver Application that they were given incorrect advice by someone in HR or makes reference to something another person told them that they relied on, the employee must include a signed statement from that person confirming what was said. See the sample statement provided at **Appendix C**.

Step 3 – Assembling Your Waiver Package

All waiver packages should be organized in the following order:

- Tab 1 - Completed and signed Waiver of Indebtedness Application DD Form 2789
- Tab 2 - Notification Letter you received from your Component Human Resources, and any other notices you may have received notifying you about an error in your retirement code.
- Tab 3 - DFAS Debt Notification letter
- Tab 4 - SF-50s for entire debt period (and missing document statements – if applicable)
- Tab 5 - LESs for entire debt period (and missing document statements – if applicable)
- Tab 6 - Employee statement why waiver should be approved
- Tab 7 - Documents you referred to in your DD-2789 Waiver Application Form – other than those covered under Tabs 1-7 (if any)
- Tab 8 - Witness statements (if any) Tab 10 - (Optional) Any other documents that you believe support your waiver application (other than those covered under Tabs 1-7)

Package Requirements:

- **All documents within each tab are required to be arranged in chronological order by date from the earliest date to most recent.** In other words, all SF-50s in Tab 5 and all LESs under Tab 6 must be arranged in chronological order. For example: LES - 1 Jan 2015, LES - 5 July 2016, LES - 9 Aug 2018, LES - 2 Jun 2020, etc.
- **Each tab must start with a tab separator sheet found in Appendix D.** All documents belonging under that tab should be arranged in chronological order by date from the earliest date to most recent behind the tab separator sheet.
- All waiver packages must be submitted with a Privacy Act cover sheet on top. **Appendix E**
- **Double-check your waiver package** using the checklist at **Appendix F** to make sure your waiver package is complete before filing!
- **Scan ALL documents together to make one (1) single Waiver Package. See example waiver package at Appendix G.** For packages over 150 pages in length, see electronic filing instructions below.

Step 4 – Filing Your Waiver Package

Employees have two (2) options for submitting their waiver packages.

Option 1 – Electronic Submission (unless no scanner access)

Option 2 – Hard-Copy Submission

For tracking purposes, it is STRONGLY RECOMMENDED that all impacted employees file their waiver packages via DoD SAFE to dfas.indianapolis-in.zhs.mbx.tech-services-team@mail.mil. The ONLY exceptions should be for employees who do not have access to a scanner at work or

at home. These employees will be permitted to file their waiver packages with the DFAS HRO in hard-copy.

ELECTRONIC FILING:

1. **ALL waiver packages under 150 pages in length should be scanned together to make one (1) single PDF Waiver Package document.** See example waiver package at **Appendix G**. Packages over 150 pages in length should be broken down into 2 or 3 pieces and scanned and saved separately.
2. All electronic waiver packages are REQUIRED to be submitted via DoD SAFE to the DFAS HRO POC designated to receive waiver packages.
 - a. DoD SAFE file size **is limited to 8 gigabytes (GB) per transfer**. 8 GB is a very large file size, however waiver packages over 150 pages in length should be broken down into 2 or 3 pieces and transmitted separately to ensure you do not exceed the file size.
 - b. The email box <mailto:dfas.indianapolis-in.zhs.mbx.tech-services-team@mail.mil> is monitored by human resources specialists who will send waiver requests to DFAS Civilian Pay, and can assist with questions, obtaining supporting documentation, reviewing packages for completeness, and serve as the collection point for all retirement contribution error waiver packages.

NOTE: All impacted employees have the option to file their waiver application packages directly with DFAS in accordance with the instructions provided in the DFAS debt notification letter.

3. **BEFORE you begin scanning your documents, CHECK THE SCANNER SETTINGS!** Changing the scanner settings to the following will help to keep the file size to a minimum.
 - a. If the default setting is color and/or photo, change the settings to scan in black and white TEXT. **Do NOT use the photo/color setting!** Using the Text setting produces significantly smaller file sizes than the photo setting.
 - b. Set the resolution to 200 dpi.
 - c. If you are scanning documents that are single-sided, then make sure the scanner is set to scan single-sided. Likewise, if you are scanning documents that are double-sided, then make sure the scanner is set to scan double-sided.
 - d. If you are scanning a mix of double-sided and single sided documents, please change the scanner settings accordingly as you scan.
 - e. If the scanner is not actively being used, after a few minutes, it will go back to the default scan settings. **ALWAYS re-check the scanner settings between batches!**
4. It is recommended that you name your file(s) in the following format to ensure they are routed for proper processing: [Waiver Request_FERS_\(Your Last Name\).pdf](#).
5. To access DoD SAFE go to: <https://safe.apps.mil/> and select your authentication certificate. On the DoD SAFE home page, click on Drop-Off (see below)

DoD SAFE

safe.apps.mil

This information system is approved for CUI and PII/PHI data

Logged on as user: MORRIS.SANDRA.JANE



Drop-off
Upload files to send to others

Request a Drop-off
Ask for files to be sent to you

Pick-Up
Download files sent to you

Outbox
View Drop-off details

Help
Get help using DoD SAFE

Announcements

New features in DoD SAFE 1.7 such as:

- Improved user guide now available directly on SAFE website.
- Expired drop-offs can be viewed.
- Subset of files in a drop-off can be downloaded in a zip.
- Selected recipients can be re-sent a drop-off.
- Drop-off screen UI enhancements to streamline file drop-off process.

DoD SAFE is approved for CUI/PII/PHI file exchange, but files must be encrypted. [How do I encrypt files?](#)

FAQ Quick Clicks

- How secure is DoD SAFE?
- Can SAFE be used for backup storage?
- Why is my CAC not working?
- Why is my PIV not working?
- How do I send files?
- What kind of files can I send?
- How long are Drop-offs active?
- How does DoD SAFE handle file transfers containing malware or malicious files?

Send and receive up to CUI/PII/PHI files (up to 8 GB total) using Department of Defense (DoD) Secure Access File Exchange (SAFE)

IMPORTANT

- Per Office of the Secretary of Defense (OSD) guidance, DoD SAFE should NOT be used for transmission of contract proposals or other contract award documentation. Instead, OSD directs that the Procurement Integrated Enterprise Environment (PIEE) be used for time sensitive contract submissions and related documentation.

When you click “Drop-off,” a dialogue box will appear asking you to add recipients.

DoD SAFE

safe.apps.mil/verify.php

This information system is approved for CUI and PII/PHI data

Logged on as user: MORRIS.SANDRA.JANE

Home Drop-Off Request a Drop-Off

PLEASE NOTE
NO CLASSIFIED INFORMATION IS ALLOWED
Any files containing CUI/PII/PHI must be encrypted.
It is the user's responsibility to only send files encrypted.
Uploaded files are scanned for viruses.
Do not share or disclose drop-off information in any form!

This web page will allow you to drop-off (upload) files to other users (others). The recipient will receive an automated email containing the information you enter below and instructions for downloading the file.

DoD SAFE does not guarantee delivery of documents within a specified time period under 4 hours. File transfers of malware or malicious files are not supported.

From:
MORRIS.SANDRA.JANE <sandra.j.morris18.civ@us.navy.mil> USN

To:

Short note to the Recipients:

Encrypt every file (REQUIRED FOR CUI, PII, AND PHI)
 Send me an email when the Drop-Off is completed
 Send me an email when each recipient picks up the files

* Note should not contain CUI, PII, PHI, or the Encryption Passphrase

1000 / 1000 left

Add Recipients

Add One Add Many

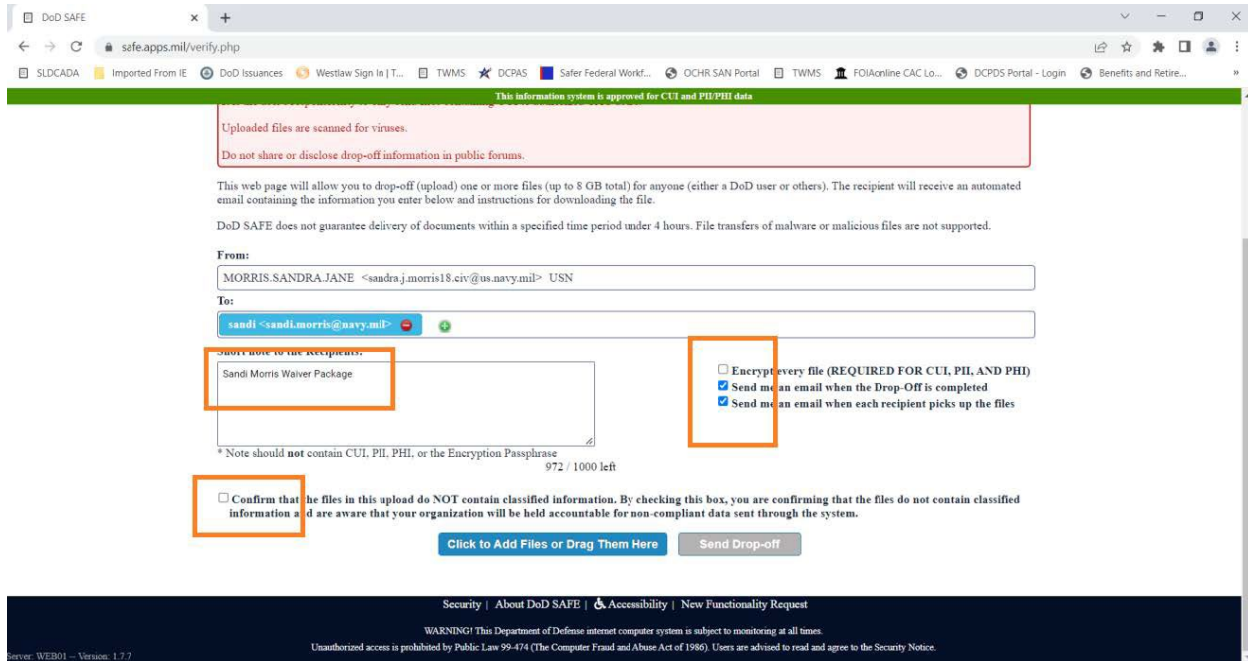
Name: Adds to your address book

Email:

Add Add & Close

Type in **your Component HRO** in the top box, and **dfas.indianapolis-in.zhs.mbx.tech-services-team@mail.mil** below. It is recommended that you cut and paste the e-mail address directly to ensure it is correct, then click “Add & Close”.

After you click the “Add and Close” button, you will be taken to the screen below.



In the Note box, type in your name and “waiver package” as shown above.

You also need to click the box at the bottom of the page confirming that your upload does NOT contain any classified information.

Next, click ALL the boxes to the right. This will ensure you receive an e-mail when the drop-off is complete, and more importantly, when the recipient (DFAS HRO POC) picks up your drop off.

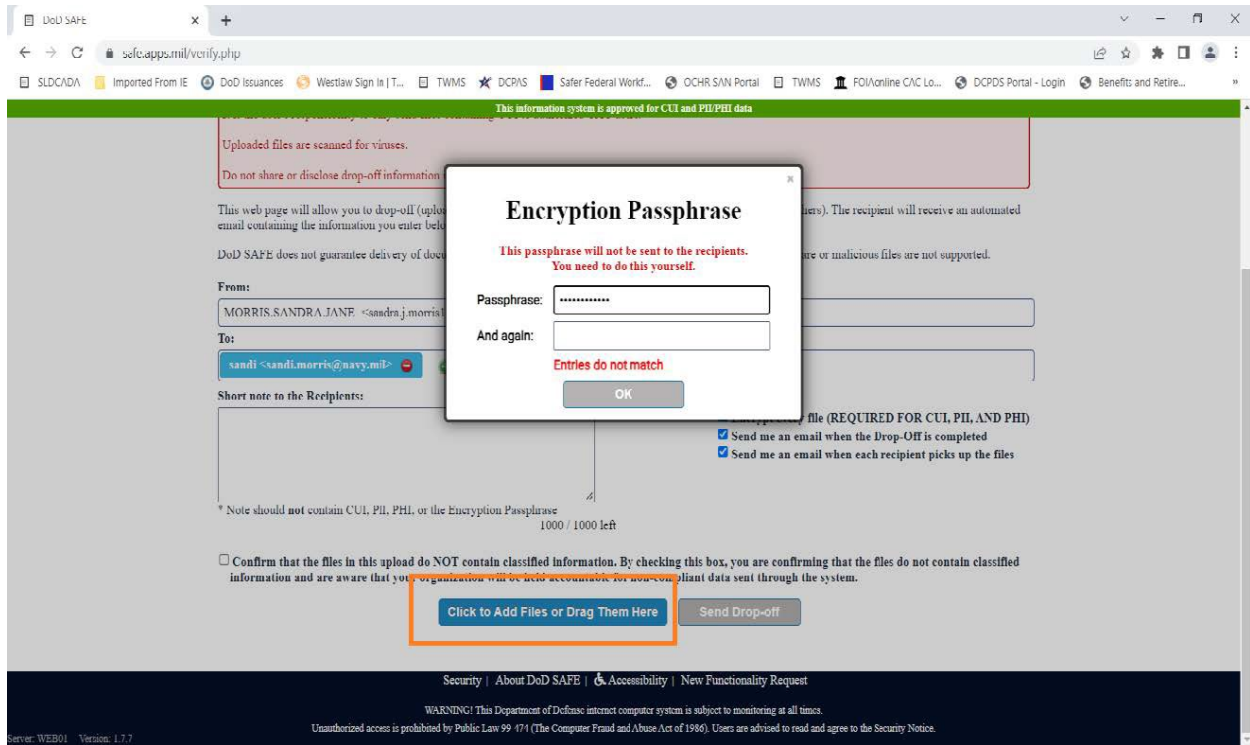
Save the e-mail confirming the DFAS HRO POC picked up your drop off as PROOF of filing your waiver package.

When you click on the box to encrypt every file, a dialogue box will open asking you to enter a passphrase (i.e. password). The passphrase must be at least 10 characters in length.

When you type in the passphrase, you will get a message that the entries do not match (see below).

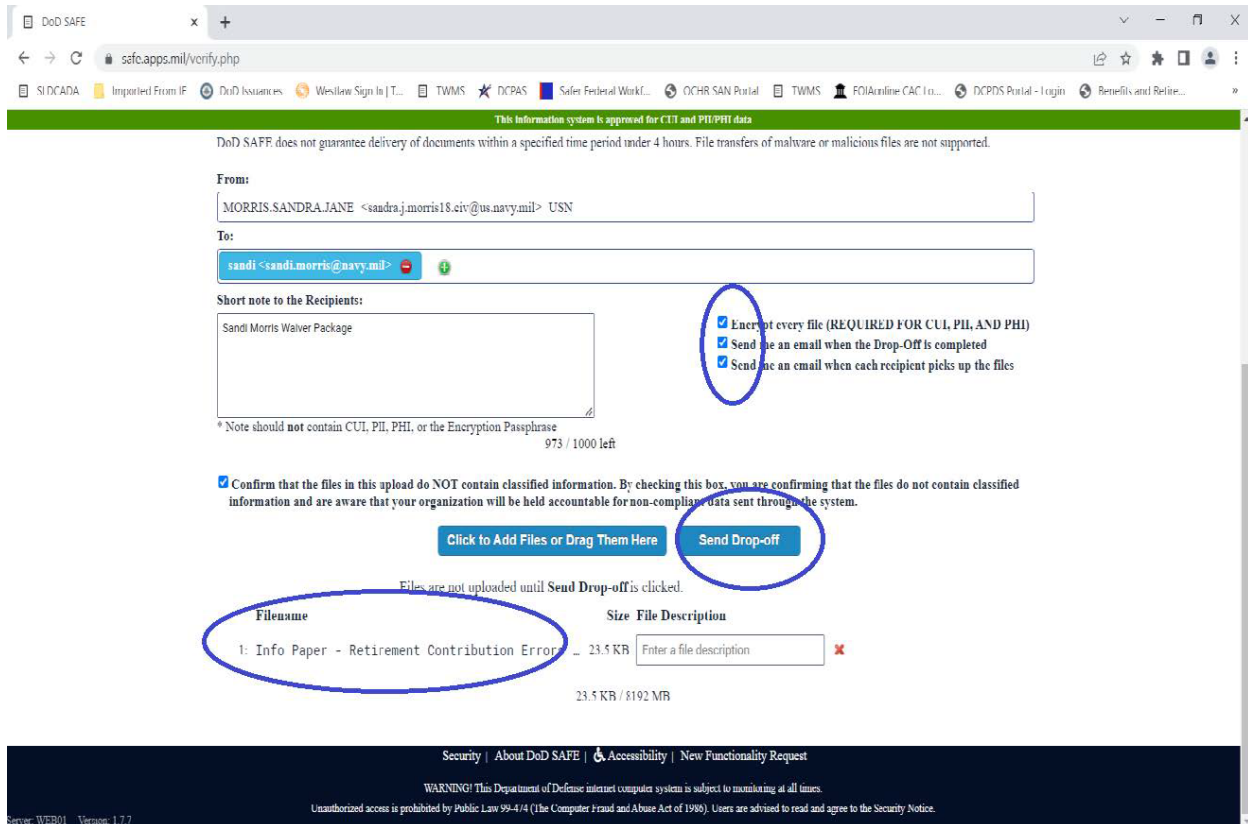
That’s ok. The message will go away when you type in the passphrase again.

Note - If you have to break your package into pieces because your waiver package exceeds the 8 GB file size, you can re-use the same passphrase for each transmission.



After you enter the passphrase again, click on the blue box at the bottom of the page titled “Click to Add Files or Drag Them Here” to upload your waiver package. The uploaded file will appear at the bottom of the screen under Filename (circled below).

Double-check to make sure all 3 boxes to the right are all checked. Then click “Send Drop-Off”



NOTE - DoD SAFE does not e-mail the passphrase to the recipient – you must do this yourself! After you drop off your package, you must go into Outlook and e-mail the DFAS HRO POC with the passphrase (password) so the POC can download and open your waiver package. Once the DFAS HRO POC accepts your file, you will receive an email confirmation. Please save this email as your confirmation of delivery.

HARD-COPY FILING:

Hard-copy filing should only be for employees who do not have access to a scanner at work or at home.

1. Print out all documents and assemble in the order outlined in Step 3 above, to include Tab Separator Sheets and Privacy Act cover sheet.
2. Double-check your package by completing the checklist at **Appendix F**
3. Make a complete copy of your waiver package to keep for your files!
4. Mail the waiver request package to:
 - DFAS Shared Services Center
 - Attn: TST Retirement Corrections
 - 8899 E. 56th Street
 - Indianapolis, IN 46249

5. Upon receipt, your DFAS HRO will send email confirmation via the email address you provide on your DD Form 2789 (Waiver/Remission of Indebtedness Application). **Save the email receipt in your waiver request file.**

Step 5 – Waiver Package Status

You have now completed and filed your waiver. It may take up to a year or more before an initial decision is made on your waiver application. You will receive a written notification of the waiver decision when the waiver authority has completed adjudication of your waiver application.

The amount of the debt determines who has waiver approval authority. The waiver approval authority for debts \$1,500 and under is the Director of DFAS-Indianapolis. For debts over \$1,500, the DoD waiver approval authority is the Director of the Defense Office of Hearings and Appeals (DOHA).

For status updates on your waiver package, please email the DFAS HRO (dfas.indianapolis-in.zhs.mbx.tech-services-team@mail.mil). The DFAS HRO will obtain a status for you. As stated above, the waiver adjudication process can take up to a year or more. In light of this, please limit the frequency of your status inquiries to once every four (4) months.

Appendix A – DD Form 2789

DD Form 2789 in fillable PDF format is available online at <https://www.esd.whs.mil/Portals/54/Documents/DD/forms/dd/dd2789.pdf>

Appendix B – eOPF Download Instructions

eOPF Tips & Techniques

Search, View, Print, and Save Documents Using My eOPF

Introduction

The electronic Official Personnel Folder, or eOPF, manages all personnel documents, organized by virtual folders. The Permanent and Temporary virtual folders contain documents in accordance with OPM's *Guide to Personnel Recording Keeping* (located at: <http://www.opm.gov/policy-data-oversight/data-analysis-documentation/personnel-documentation/>).

Useful Features

My eOPF button:

Lists the details associated with your eOPF and your documents. By clicking the **My eOPF** button, you can access subject tabs which will appear at the top of the screen.

My eOPF Search page:

While you do not have to use these filters, they can help narrow search results. Available search fields include:

Search Option	Format	Details
Form <i>(Groupings)</i>	Radio button	Select from these groupings: <ul style="list-style-type: none">• Common Forms - frequently used forms found in eOPF• All Forms - all forms found in eOPF• Agency Forms - forms used only in your agency
Form <i>(Number/Title)</i>	Drop-down list	To locate a particular form quickly, enter the first letter of the form number in the drop-down menu. For example, to find an SF 50, enter "SF" in the drop-down menu to jump to the forms beginning with "SF."
Type	Drop-down list	Select the specific document type related to the form. Types depend on the form selected.
Folder Sides	Check box	Select the folder side(s) in which you want to search. Check the Select All box to search all folders.
Create Date	Field and Calendar	Create Date is the date that a document is added to eOPF.
Effective Date	Fields and Calendars	Using Start Effective Date and End Effective Date limits the number of returned documents to those within the specified effective date range.

My eOPF Print Folder page:

Enables you to select a folder side(s) and create a printable file. This function compiles all of the individual documents saved to the selected folder side(s) to one consolidated PDF file which can be found on the print status page.

My eOPF Print Status page:

Provides a list of print requests that you have submitted, displaying in the order in which they were submitted. Each print request is assigned a Request Identification (Request ID) number. Depending on the size of a request, a print job may be broken into two or more parts. A password is required for access.

New Security Feature for Print Requests

If you want to print several documents at once, or an entire eOPF, you will first make a print request. The completed request is accessed from the print status page. Before you can view, save or print a print request, you must enter a password unique to your request. Instructions about the password function are included in this document, in Part 5, and also on the print status pages of the eOPF application.

In this Document

The following sections detail the steps to view, search, sort, print, and save your documents.

Part 1: View, Print, and Save a Single Document

Part 2: Sort your Documents

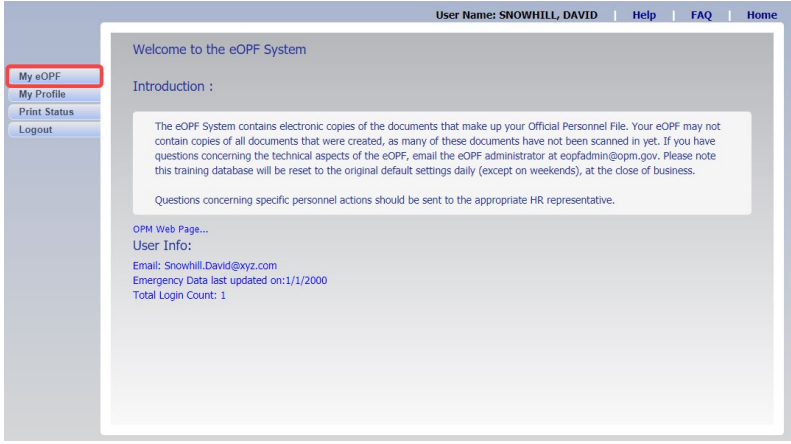
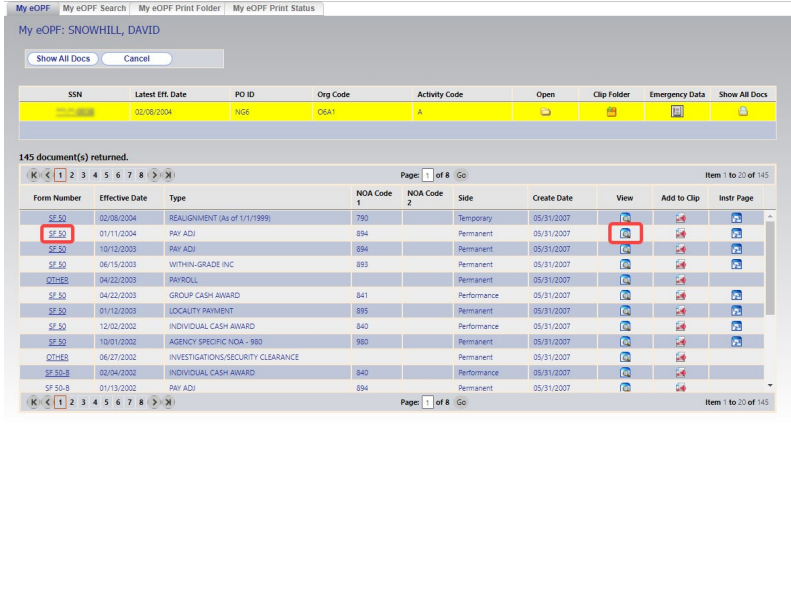

Part 3: Search for Specific Documents

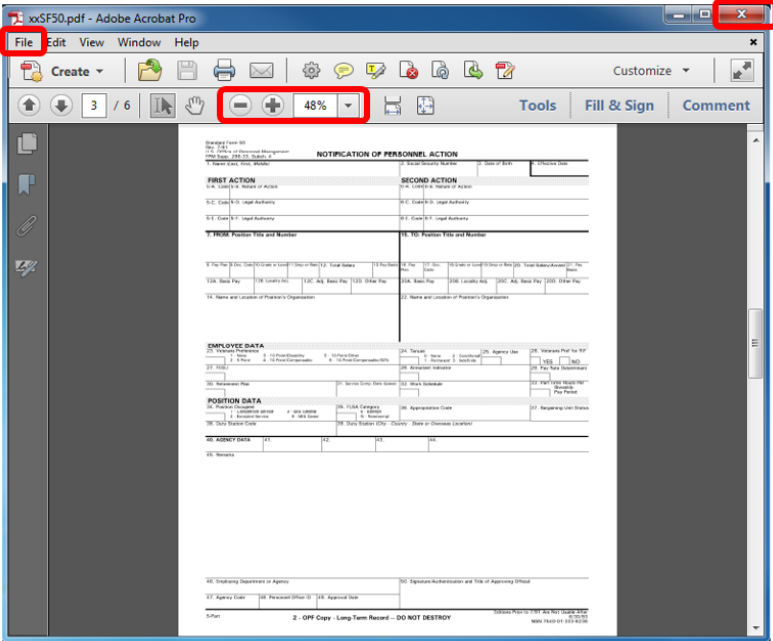
Part 4: Select a Group of Documents

Part 5: Use Print Status

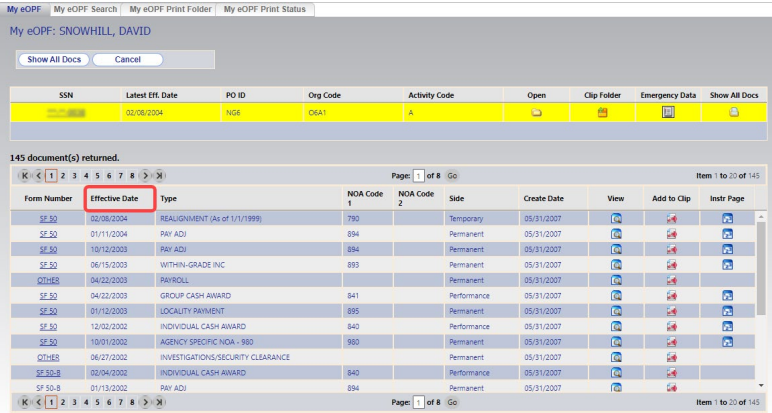
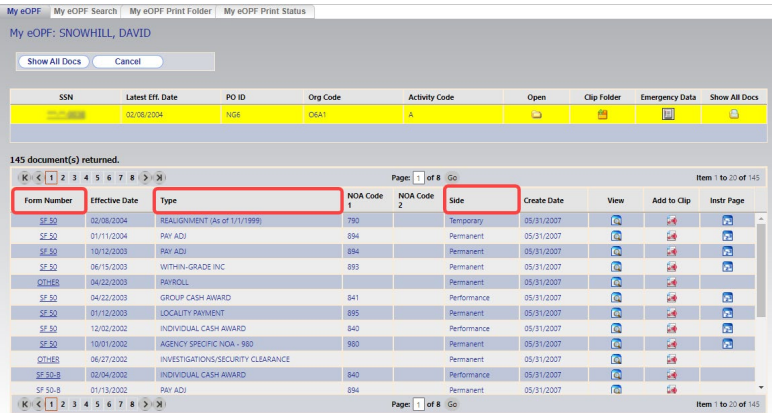
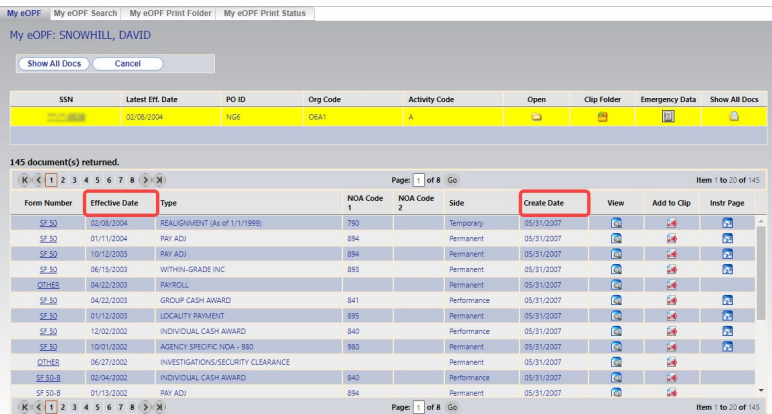
Part 6: Print your entire eOPF

Part 1: View, Print, and Save a Single Document

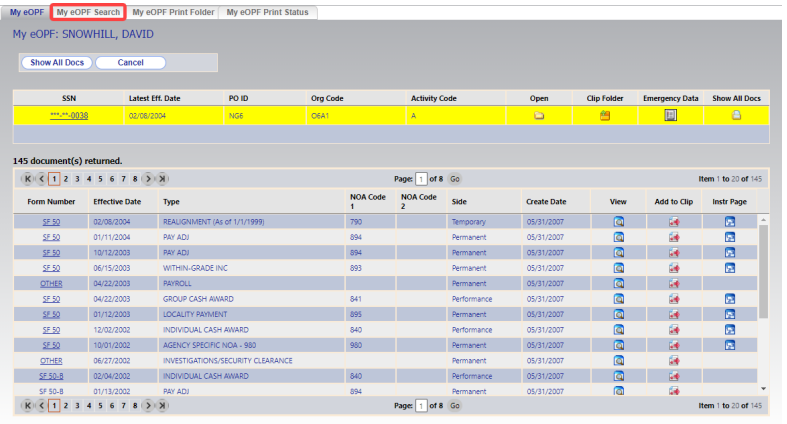
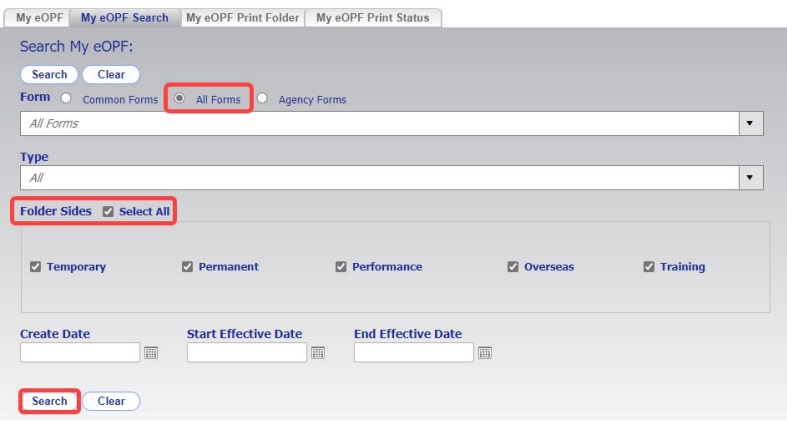
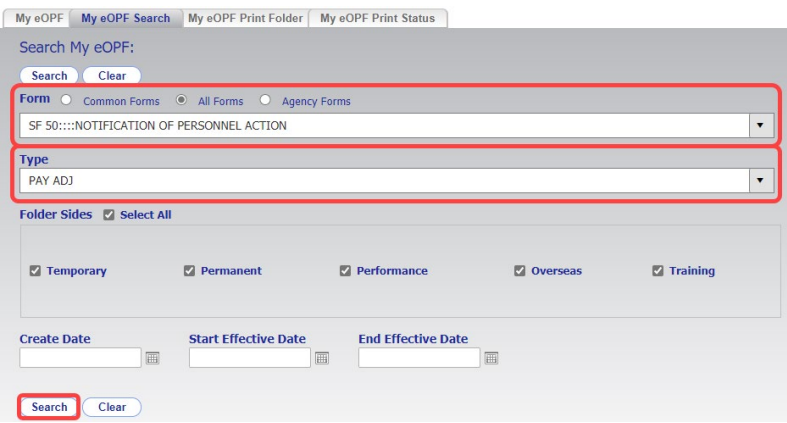
Step	Action	Screen Shot																																																																																																																																																				
1	From the eOPF main menu, select the My eOPF button.	 <p>User Name: SNOWHILL, DAVID Help FAQ Home</p> <p>Welcome to the eOPF System</p> <p>Introduction :</p> <p>The eOPF System contains electronic copies of the documents that make up your Official Personnel File. Your eOPF may not contain copies of all documents that were created, as many of these documents have not been scanned in yet. If you have questions concerning the technical aspects of the eOPF, email the eOPF administrator at eopfadmin@opm.gov. Please note this training database will be reset to the original default settings daily (except on weekends), at the close of business.</p> <p>Questions concerning specific personnel actions should be sent to the appropriate HR representative.</p> <p>OPM Web Page... User Info: Email: Snowhill.David@xyz.com Emergency Data last updated on:1/1/2000 Total Login Count: 1</p>																																																																																																																																																				
2	<p>The My eOPF page displays by default. This page lists documents in the eOPF, in chronological order with the most recent Effective Date first.</p> <p>Depending on My Profile – General Preferences settings, the screen may display differently than shown here. Please refer to the “eOPF User Guide” for details.</p> <p>To view a document, either click the Form Number or click the View icon.</p>	 <p>My eOPF My eOPF Search My eOPF Print Folder My eOPF Print Status</p> <p>My eOPF: SNOWHILL, DAVID</p> <p>Show All Docs Cancel</p> <table border="1"> <thead> <tr> <th>SSN</th> <th>Latest Eff. Date</th> <th>PO ID</th> <th>Org Code</th> <th>Activity Code</th> <th>Open</th> <th>Clip Folder</th> <th>Emergency Data</th> <th>Show All Docs</th> </tr> </thead> <tbody> <tr> <td></td> <td>02/08/2004</td> <td>NGE</td> <td>OGA1</td> <td>A</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>145 document(s) returned.</p> <p>Page: 1 of 8 Go</p> <table border="1"> <thead> <tr> <th>Form Number</th> <th>Effective Date</th> <th>Type</th> <th>NOA Code 1</th> <th>NOA Code 2</th> <th>Side</th> <th>Create Date</th> <th>View</th> <th>Add to Clip</th> <th>Instr Page</th> </tr> </thead> <tbody> <tr> <td>SE 50</td> <td>02/08/2004</td> <td>REALIGNMENT (As of 1/1/1999)</td> <td>790</td> <td></td> <td>Temporary</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE 50</td> <td>01/11/2004</td> <td>PAY ADJ</td> <td>894</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE 50</td> <td>10/12/2003</td> <td>PAY ADJ</td> <td>894</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE 50</td> <td>06/15/2003</td> <td>WITHIN-GRADE INC</td> <td>893</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Q2:HE</td> <td>04/02/2003</td> <td>PAYROLL</td> <td></td> <td></td> <td></td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE 50</td> <td>04/22/2003</td> <td>GROUP CASH AWARD</td> <td>841</td> <td></td> <td>Performance</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE 50</td> <td>01/12/2003</td> <td>LOCALITY PAYMENT</td> <td>895</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE 50</td> <td>12/02/2002</td> <td>INDIVIDUAL CASH AWARD</td> <td>840</td> <td></td> <td>Performance</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE 50</td> <td>10/01/2002</td> <td>AGENCY SPECIFIC NDA - 980</td> <td>980</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Q2:HE</td> <td>06/27/2002</td> <td>INVESTIGATIONS/SECURITY CLEARANCE</td> <td></td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50-B</td> <td>02/04/2002</td> <td>INDIVIDUAL CASH AWARD</td> <td>840</td> <td></td> <td>Performance</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50-B</td> <td>01/13/2002</td> <td>PAY ADJ</td> <td>894</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Page: 1 of 8 Go</p> <p>Item 1 to 20 of 145</p>	SSN	Latest Eff. Date	PO ID	Org Code	Activity Code	Open	Clip Folder	Emergency Data	Show All Docs		02/08/2004	NGE	OGA1	A					Form Number	Effective Date	Type	NOA Code 1	NOA Code 2	Side	Create Date	View	Add to Clip	Instr Page	SE 50	02/08/2004	REALIGNMENT (As of 1/1/1999)	790		Temporary	05/31/2007				SE 50	01/11/2004	PAY ADJ	894		Permanent	05/31/2007				SE 50	10/12/2003	PAY ADJ	894		Permanent	05/31/2007				SE 50	06/15/2003	WITHIN-GRADE INC	893		Permanent	05/31/2007				Q2:HE	04/02/2003	PAYROLL				05/31/2007				SE 50	04/22/2003	GROUP CASH AWARD	841		Performance	05/31/2007				SE 50	01/12/2003	LOCALITY PAYMENT	895		Permanent	05/31/2007				SE 50	12/02/2002	INDIVIDUAL CASH AWARD	840		Performance	05/31/2007				SE 50	10/01/2002	AGENCY SPECIFIC NDA - 980	980		Permanent	05/31/2007				Q2:HE	06/27/2002	INVESTIGATIONS/SECURITY CLEARANCE			Permanent	05/31/2007				SF 50-B	02/04/2002	INDIVIDUAL CASH AWARD	840		Performance	05/31/2007				SF 50-B	01/13/2002	PAY ADJ	894		Permanent	05/31/2007			
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3	<p>A browser download prompt may display.</p> <p>To view, click the Open button.</p>	 <p>Do you want to open or save ViewPDF.pdf from vm-f5eopf12tst1?</p> <p>Open Save Cancel</p>																																																																																																																																																				

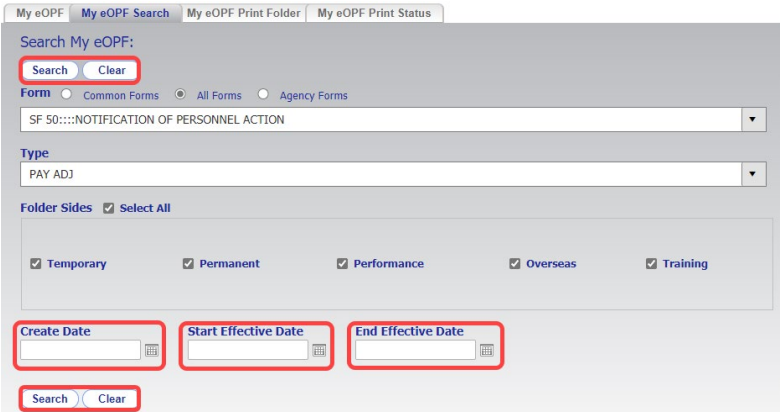
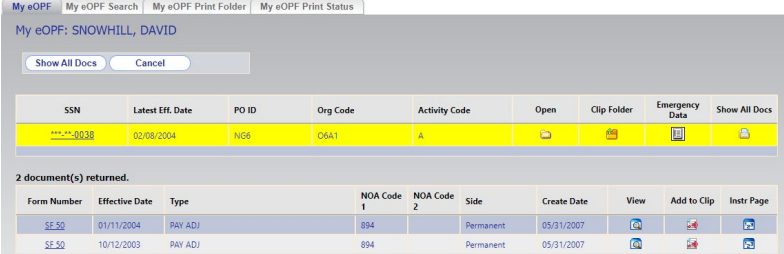
Step	Action	Screen Shot
4	<p>A new window opens in Adobe Reader. The selected document is displayed.</p> <p>To View: Use the + and – signs to change the size of the document for better viewing.</p> <p>To Print: From the File menu, click the Print function to print the document to the local printer.</p> <p>To Save: From the File menu, use the Save or Save As feature to save the document onto the computer.</p> <p>Note: Most eOPF documents contain personally identifiable information and should be protected at all times.</p> <p>Once finished, select the red 'X' icon to close the document window.</p>	

Part 2: Sort your Documents

Step	Action	Screen Shot																																																																																																																																		
1	<p>From the My eOPF page, you can change the sort order in any column.</p> <p>In this example, the Effective Date column header is highlighted.</p> <p>Select a column header to sort in descending order.</p> <p>Select again for ascending order. The sort order remains in effect until another field is selected or logged out of eOPF.</p>	 <p>The screenshot shows the 'My eOPF' page for user SNOWHILL, DAVID. A table lists 145 documents. The 'Effective Date' column header is highlighted with a red box. The table data is as follows:</p> <table border="1"> <thead> <tr> <th>Form Number</th> <th>Effective Date</th> <th>Type</th> <th>NOA Code 1</th> <th>NOA Code 2</th> <th>Side</th> <th>Create Date</th> <th>View</th> <th>Add to Clip</th> <th>Instr Page</th> </tr> </thead> <tbody> <tr><td>SE-30</td><td>02/08/2004</td><td>REALIGNMENT (As of 1/1/1999)</td><td>790</td><td></td><td>Temporary</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30</td><td>01/11/2004</td><td>PAY ADJ</td><td>894</td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30</td><td>10/12/2003</td><td>PAY ADJ</td><td>894</td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30</td><td>06/15/2003</td><td>WITHIN-GRADE INC</td><td>893</td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>OT:HE</td><td>04/22/2003</td><td>PAYROLL</td><td></td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30</td><td>04/22/2003</td><td>GROUP CASH AWARD</td><td>841</td><td></td><td>Performance</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30</td><td>01/12/2003</td><td>LOCALITY PAYMENT</td><td>895</td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30</td><td>12/02/2002</td><td>INDIVIDUAL CASH AWARD</td><td>840</td><td></td><td>Performance</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30</td><td>10/01/2002</td><td>AGENCY SPECIFIC NOA - 980</td><td>980</td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>OT:HE</td><td>06/27/2002</td><td>INVESTIGATIONS/SECURITY CLEARANCE</td><td></td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SE-30-B</td><td>02/04/2002</td><td>INDIVIDUAL CASH AWARD</td><td>840</td><td></td><td>Performance</td><td>05/31/2007</td><td></td><td></td><td></td></tr> <tr><td>SF 50-B</td><td>01/13/2002</td><td>PAY ADJ</td><td>894</td><td></td><td>Permanent</td><td>05/31/2007</td><td></td><td></td><td></td></tr> </tbody> </table>	Form Number	Effective Date	Type	NOA Code 1	NOA Code 2	Side	Create Date	View	Add to Clip	Instr Page	SE-30	02/08/2004	REALIGNMENT (As of 1/1/1999)	790		Temporary	05/31/2007				SE-30	01/11/2004	PAY ADJ	894		Permanent	05/31/2007				SE-30	10/12/2003	PAY ADJ	894		Permanent	05/31/2007				SE-30	06/15/2003	WITHIN-GRADE INC	893		Permanent	05/31/2007				OT:HE	04/22/2003	PAYROLL			Permanent	05/31/2007				SE-30	04/22/2003	GROUP CASH AWARD	841		Performance	05/31/2007				SE-30	01/12/2003	LOCALITY PAYMENT	895		Permanent	05/31/2007				SE-30	12/02/2002	INDIVIDUAL CASH AWARD	840		Performance	05/31/2007				SE-30	10/01/2002	AGENCY SPECIFIC NOA - 980	980		Permanent	05/31/2007				OT:HE	06/27/2002	INVESTIGATIONS/SECURITY CLEARANCE			Permanent	05/31/2007				SE-30-B	02/04/2002	INDIVIDUAL CASH AWARD	840		Performance	05/31/2007				SF 50-B	01/13/2002	PAY ADJ	894		Permanent	05/31/2007			
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Part 3: Search for Specific Documents

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1	<p>To search for a specific document, select the My eOPF Search tab at the top of the page.</p>	 <p>The screenshot shows the 'My eOPF Search' page with the search results for 'My eOPF Search' displayed. The search criteria are: My eOPF Search, My eOPF Print Folder, My eOPF Print Status. The search results show 145 document(s) returned. The table below lists the search results:</p> <table border="1"> <thead> <tr> <th>Form Number</th> <th>Effective Date</th> <th>Type</th> <th>NOA Code 1</th> <th>NOA Code 2</th> <th>Side</th> <th>Create Date</th> <th>View</th> <th>Add to Clip</th> <th>Instr Page</th> </tr> </thead> <tbody> <tr> <td>SF 50</td> <td>02/08/2004</td> <td>REALIGNMENT (As of 1/1/1999)</td> <td>790</td> <td></td> <td>Temporary</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50</td> <td>01/11/2004</td> <td>PAY ADJ</td> <td>894</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50</td> <td>10/12/2003</td> <td>PAY ADJ</td> <td>894</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50</td> <td>06/15/2003</td> <td>WITHIN-GRADE INC</td> <td>893</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>OT4ER</td> <td>04/22/2003</td> <td>PAYROLL</td> <td></td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50</td> <td>04/22/2003</td> <td>GROUP CASH AWARD</td> <td>841</td> <td></td> <td>Performance</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50</td> <td>01/12/2003</td> <td>LOCALITY PAYMENT</td> <td>895</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50</td> <td>12/02/2002</td> <td>INDIVIDUAL CASH AWARD</td> <td>840</td> <td></td> <td>Performance</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50</td> <td>10/01/2002</td> <td>AGENCY SPECIFIC NOA - 980</td> <td>980</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>OT4ER</td> <td>06/27/2002</td> <td>INVESTIGATIONS/SECURITY CLEARANCE</td> <td></td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50-B</td> <td>02/04/2002</td> <td>INDIVIDUAL CASH AWARD</td> <td>840</td> <td></td> <td>Performance</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> <tr> <td>SF 50-B</td> <td>01/13/2002</td> <td>PAY ADJ</td> <td>894</td> <td></td> <td>Permanent</td> <td>05/31/2007</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Form Number	Effective Date	Type	NOA Code 1	NOA Code 2	Side	Create Date	View	Add to Clip	Instr Page	SF 50	02/08/2004	REALIGNMENT (As of 1/1/1999)	790		Temporary	05/31/2007				SF 50	01/11/2004	PAY ADJ	894		Permanent	05/31/2007				SF 50	10/12/2003	PAY ADJ	894		Permanent	05/31/2007				SF 50	06/15/2003	WITHIN-GRADE INC	893		Permanent	05/31/2007				OT4ER	04/22/2003	PAYROLL			Permanent	05/31/2007				SF 50	04/22/2003	GROUP CASH AWARD	841		Performance	05/31/2007				SF 50	01/12/2003	LOCALITY PAYMENT	895		Permanent	05/31/2007				SF 50	12/02/2002	INDIVIDUAL CASH AWARD	840		Performance	05/31/2007				SF 50	10/01/2002	AGENCY SPECIFIC NOA - 980	980		Permanent	05/31/2007				OT4ER	06/27/2002	INVESTIGATIONS/SECURITY CLEARANCE			Permanent	05/31/2007				SF 50-B	02/04/2002	INDIVIDUAL CASH AWARD	840		Performance	05/31/2007				SF 50-B	01/13/2002	PAY ADJ	894		Permanent	05/31/2007			
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2	<p>The Search My eOPF page displays.</p> <p>Enter search criteria in the available fields to retrieve specific documents. The more specific the entered search criteria, the more targeted the search results.</p> <p>To return all documents in the folder, select the All Forms radio button in the Form section and select Select All in the Folder Sides check box.</p> <p>Select the Search button.</p>	 <p>The screenshot shows the 'Search My eOPF' page with the following search criteria:</p> <ul style="list-style-type: none"> Form: All Forms Type: All Folder Sides: <input checked="" type="checkbox"/> Select All Temporary: <input checked="" type="checkbox"/> Permanent: <input checked="" type="checkbox"/> Performance: <input checked="" type="checkbox"/> Overseas: <input checked="" type="checkbox"/> Training: <input checked="" type="checkbox"/> <p>The Search button is highlighted.</p>																																																																																																																																		
3	<p>To narrow the search, select a specific Form and/or a specific document Type from the drop-down lists.</p> <p>To find the form or type more quickly, type the name or number of a Form or a Type into the drop-down text boxes. This will bring up forms beginning with that letter or number.</p> <p>Select the Search button.</p>	 <p>The screenshot shows the 'Search My eOPF' page with the following search criteria:</p> <ul style="list-style-type: none"> Form: SF 50:::NOTIFICATION OF PERSONNEL ACTION Type: PAY ADJ Folder Sides: <input checked="" type="checkbox"/> Select All Temporary: <input checked="" type="checkbox"/> Permanent: <input checked="" type="checkbox"/> Performance: <input checked="" type="checkbox"/> Overseas: <input checked="" type="checkbox"/> Training: <input checked="" type="checkbox"/> <p>The Search button is highlighted.</p>																																																																																																																																		

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4	<p>Searching for documents can also be done by Create Date (the date the document was added to eOPF) as well as Start Effective Date and End Effective Date which targets forms with an Effective Date falling within a specified range.</p> <p>To start all over with new search criteria, use the Clear button.</p> <p>Once all criteria are entered, click the Search button at either the top or the bottom of the page.</p>	
5	<p>The My eOPF page displays with the search results. The documents meeting the entered search criteria are listed.</p>	

Appendix C – Sample Statements

Missing Leave and Earnings Statements (LES)

Example Statement

Employee Name
Address
City, State zip code
E-Mail Address

DATE

RE: MISSING LEAVE AND EARNING STATEMENTS

Dear DFAS Civilian Pay Representative:

I have included ALL the Leave and Earning Statements (LES) I have in my possession (including all the LESs available to me on MyPay) in my waiver application package. I no longer have access to my LESs other than those attached to my waiver application.

I acknowledge receiving and/or having access to these leave and earnings statements in the past. The time periods are: 11-22-2010 through 7-20-2021.

Thank you.

Sincerely,
Signature

No LES and SF-50s before Error Occurred

Example Statement

Employee Name
Address
City, State zip code
E-Mail Address

DATE

RE: No Leave and Earnings Statements & SF-50s from Before the Error Occurred

Dear DFAS Civilian Pay Representative:

I understand that I am supposed to provide three Leave and Earning Statements (LES) and one Standard Form 50 (SF-50) for the time period before the retirement coding error occurred.

In my case, this is not possible because these documents do not exist. The retirement code error occurred at the time of my initial appointment to Federal service on [insert date of appointment] therefore, there are no SF-50s or LESs in my service record that pre-date the retirement code error.

Thank you.

Sincerely,
Signature

Employee Statement In Support of Waiver Request

Example Statement

Employee Name
Address
City, State zip code
E-Mail Address

DATE

RE: Statement in Support of My Waiver Request

Dear DFAS Civilian Pay Representative:

I am applying for a waiver of the debt I incurred as a result of a retirement code error that <Component HRO> recently discovered in my service record. According to the information I received from <Component HRO>, I was incorrectly coded as _____, when I should have been coded as _____. According to my DFAS debt letter, the amount of the debt I now owe is \$ _____.

I believe my waiver request meets the DoD standard for waiver and should be approved for the following reasons:

(State in detail all the reasons you feel your waiver should be approved)

Thank you for your consideration.

Sincerely,
Signature

Example Witness Statement

Employee Name
Address
City, State zip code
E-Mail Address

DATE

RE: Retirement Code Error Statement

Dear DFAS Civilian Pay Representative:

My name is _____. I am a [pay plan/series/grade].

I work with [name of impacted employee] and I confirm that on or about [date] I told [name of impacted employee] the following:

[Describe in detail what was stated in this conversation]

I confirm the above statement is a true and correct summary of what I said to [name of impacted employee]. If you have any questions regarding my statement I may be reached at [e-mail or phone number].

Thank you.

Sincerely,
Signature

Appendix D – Tab Separator Sheets

Waiver of Indebtedness Application DD Form 2789

TAB 1

Component Notification Letter & Any Other Notices Received

TAB 2

DFAS Debt Notification Letter

TAB 3

SF-50s for Entire Debt Period

TAB 4

LESs for Entire Debt Period

TAB 5

Employee Statement Why Waiver Should Be Approved

TAB 6

Other Documents Referred to in Waiver Application

TAB 7

Witness Statements

TAB 8

Other Documents in Support of Waiver Application

TAB 9

Appendix E – Privacy Act Cover Sheet

The Privacy Act Cover Sheet DD Form 2923 must be first page of your waiver request package. Print the form (next page) or go to <https://www.disa.mil/-/media/Files/DISA/About/Privacy-Office/dd2923.pdf>



Privacy Act Data Cover Sheet

To be used on
all documents
containing personal
information

DOCUMENTS ENCLOSED ARE SUBJECT TO THE PRIVACY ACT OF 1974

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Privacy Act Data Cover Sheet

Appendix F – Waiver Package Checklist

DFAS WAIVER PACKAGE CHECKLIST

- Privacy Act Cover Sheet
- TAB 1 Separator Sheet**
- Completed and signed Waiver/Remission of Indebtedness Application DD Form 2789
 - CAC digital signatures or physical handwritten “wet” signatures ONLY!
- TAB 2 Separator Sheet**
- Notification Letter you received from your Component
 - (If Applicable) Any other notices you may have received regarding an error in your retirement code.
- TAB 3 Separator Sheet**
- DFAS Debt Notification Letter
- TAB 4 Separator Sheet**
- SF-50s for entire debt period (including one SF-50 *before* error occurred and correction 50)
 - ALL SF-50s are in **chronological order by date**
 - (If Applicable) Statement explaining any missing SF-50s
- TAB 5 Separator Sheet**
- LESs for entire debt period (including 3 *before* the error occurred, and 3 *after* the correction)
 - ALL LESs are in **chronological order by date**
 - (If Applicable) Statement explaining any missing LESs

WAIVER PACKAGE CHECKLIST (cont.)

- TAB 6 Separator Sheet**
- Employee statement why waiver should be approved
- TAB 7 Separator Sheet - Optional** (DO NOT include in waiver package if you DID NOT refer to any additional documents in your wavier application - other than those listed in tabs 1-6 above)
- Documents referred to in the DD-2789 Waiver Application Form (other than those llisted in tabs 1-6 above)
- TAB 8 Separator Sheet - Optional** (DO NOT include in waiver package if you have no witness statements to provide)
- Witness statements (if any)
- TAB 9 Separator Sheet - Optional** (DO NOT include in waiver package if you have no additional documentation to submit other than that listed in tabs 1-8 above)
- Other documents you believe support your request for a waiver

Appendix G – Example Waiver Package

Your waiver request application package must include the Privacy Act Cover Sheet (see page 49). This is not included in this example to reduce the file size of this guide and make it easier for you to navigate.

Waiver of Indebtedness Application DD Form 2789

TAB 1

WAIVER/REMISSION OF INDEBTEDNESS APPLICATION

OMB No. 0730-0009
OMB expires: 20240831

If more space is needed, continue on separate sheet(s). Identify each item by number. For further guidance with completing this form, please visit: www.dfas.mil/waiversandremissions.html

The public reporting burden for this collection of information is estimated to average 2 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the Department of Defense, Washington Headquarters Services, at whs.mc-alex.esd.mbx.dd-dod-informationcollections@mail.mil. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.

PLEASE DO NOT RETURN YOUR FORM TO THE ABOVE ORGANIZATION.

- Active duty military, Guard/Reserve, retired or annuitant pay recipients, civilian employees, return completed form to the address listed on the debt notification letter for completion of the back side.
- Separated Military or former civilian employees, please see instructions website regarding where to send your claim.
- Current Active Duty Military, Guard, Reserve, Retired or Annuitant Pay Recipients, Civilian Employees: Complete Fields 1-19 For completion of the second page of the form. RETURN THE FORM TO: DFAS-IN DEPT 3300 (WAIVER/REMISSION), 8899 East 56TH Street, Indianapolis, IN 46249-3300 Unless instructed to send to a different address on debt notification letter.
- Separated Military or Former Civilian Employees complete fields 1-19. Send form to DFAS-IN DEPT. 3300 (WAIVER/REMISSION), 8899 East 56TH Street, Indianapolis, IN 46249-3300

Read Privacy Act Statement and Instructions beginning on Page 3 before completing form.

1. TYPE OF CLAIM (X one) WAIVER REMISSION (Not applicable for civilians) (If Army, please use DA Forms 3508 and 2823.)
 Authority for granting waiver: Active/Retired Military - 10 U.S.C. 2774; National Guard - 32 U.S.C. 716; Civilian - 5 U.S.C. 5584; Annuitant - 10 U.S.C. 1442/1453. Remission: Army - 10 U.S.C. 4837; Navy - 10 U.S.C. 6161; Air Force - 10 U.S.C. 9837.

SECTION I - CIVILIAN/MILITARY/RETIREE/ANNUITANT INFORMATION

2. NAME (Last, First, Middle Initial) Doe, Jane Q. 3. RANK/GRADE GS-12 4. SOCIAL SECURITY NUMBER 000-00-0000

5. AGENCY/SERVICE (X one)
 ARMY OTHER (Specify) DFAS
 NAVY
 AIR FORCE
 MARINE CORPS

6. STATUS (X applicable block and provide date (YYYYMMDD) for end of enlistment period (EOE), retirement (DOR), separation (DOS), or service computation date (SCD), as appropriate.)
 ACTIVE EOE: _____ SEPARATED DOS: _____
 GUARD/RESERVE EOE: _____ DOD CIVILIAN SCD: 20140614
 RETIRED DOR: _____ ANNUITANT

7. CURRENT COMPLETE MAILING ADDRESS (Street, City, State, ZIP Code)
 2020 Nowhere Ln
 Indianapolis, IN 46201

8. PLACE OF ASSIGNMENT OR EMPLOYMENT
 DFAS Indianapolis

9. TELEPHONE (Include DSN or area code)
 a. WORK xxx-xxx-xxxx
 b. HOME xxx-xxx-xxxx
 c. E-MAIL ADDRESS
 jane.q.doe.civ@mail.mil

10. TYPE OF DEBT OR ERRONEOUS PAYMENT
 Erroneous overpayment of salary due to retirement code error

11. GROSS DEBT AMOUNT
 \$8500.00

12. STATE THE DATE AND HOW YOU FIRST BECAME AWARE OF DEBT OR ERRONEOUS PAYMENT. (Attach notification, if available.)
 I first became aware of the error on _____ when I received a notice from DFAS HRO.

13. IF YOU WERE AWARE OF DEBT OR ERRONEOUS PAYMENT, EXPLAIN THE ACTIONS YOU TOOK TO CORRECT SITUATION.
 DFAS HRO corrected the error on _____.

14. REASON FOR REQUESTING WAIVER/REMISSION AND WHY YOU BELIEVE IT SHOULD BE APPROVED
 (Financial hardship applies ONLY to REMISSION and if claimed, a financial statement must be attached to include all supporting documentation.)
 See attached statement

15. FOR ANNUITANTS, PROVIDE NAME, SSN AND DATE DECEASED OF MILITARY MEMBER/SPONSOR.

16a. ATTACH COPIES OF ALL PERTINENT DOCUMENTS (Such as Request for BAH, Statement of Service, Separation Worksheet, DD Form 214, Travel Voucher, Notification of Personnel Action). (If not available, please explain.)

16b. HR POINT OF CONTACT (Civilian employees) 16c. HR POC PHONE

17a. IF MILITARY OR CIVILIAN, DID YOU RECEIVE LEAVE AND EARNINGS STATEMENT(S)? YES NO
 17b. IF MILITARY OR CIVILIAN, DID YOU REQUEST THEM ON MYPAY? YES NO
 17c. IF RETIREE OR ANNUITANT, DID YOU RECEIVE AN ACCOUNT STATEMENT? YES NO
 17d. IF RETIREE OR ANNUITANT, DID YOU REVIEW THEM? YES NO
 (If answer to a. or c. is Yes, attach a copy of statement covering before, during, and after period. If No, explain why.)

18. HAVE YOU FILED FOR A CORRECTION OF MILITARY RECORDS? YES NO

19. I certify the above statements are true and correct to the best of my knowledge. The information presented may be referred to the appropriate investigating office for verification. I understand the penalty for a false claim is a maximum fine of \$10,000 or a maximum imprisonment of 5 years, or both.

a. SIGNATURE (Electronic or Handwritten/Typed not accepted) b. JOB TITLE/CAREER FIELD 1035 Public Affairs Specialist c. DATE SIGNED (YYYYMMDD) 20220815

20. COMMANDER'S ENDORSEMENT (Required for Space Force, Air Force and Navy active duty and reserves. Optional for all others.)

NOT REQUIRED

21. RECOMMENDATION APPROVE PARTIAL \$ DENY RECOMMENDATION COLLECTION RATE \$

22a. COMMANDER'S OR SUPERVISOR'S NAME (Please print) 22b. SIGNATURE (Electronic or Handwritten/Typed not accepted) c. DATE SIGNED (YYYYMMDD)

SECTION II - REPORT OF INVESTIGATION

To be completed and signed by appropriate payroll/travel office. (Not applicable for retirees, annuitants, or out-of-service military members.)

23. INFORMATION ON DEBT OR ERRONEOUS PAYMENT(S)

a. GROSS DEBT AMOUNT	b. TYPE(S) OF PAYMENT(S)	c. DATE(S) OF PAYMENT(S) (YYYYMMDD)
d. (X and complete as applicable)		(5) DATE THE DEBT WAS DISCOVERED (YYYYMMDD)
(1) HAS THE DEBT BEEN VALIDATED?	YES NO	
(2) HAS THE DEBT BEEN POSTED TO THE DEBTOR'S RECORDS?	YES NO	(6) NAVY ONLY: AMOUNT UNCOLLECTED AS OF DATE OF THE COMMANDER'S SIGNATURE:
(3) REMISSION: HAS THE COLLECTION ACTION BEEN SUSPENDED?	YES NO	\$
(4) WAIVER: HAS FINANCE OFFICE SUSPENDED COLLECTION IAW DODFMR, VOL. 5, CH. 31?	YES NO	\$

DFAS FILLS OUT SECTION II

24. A DEBT COMPUTATION MUST ACCOMPANY THIS APPLICATION. It must include dates of erroneous payments, what was paid (broken down by month by entitlements), what should have been paid, and a difference. Do not include the debt posted to the debtor's record. Indicate any entitlements or credits used to offset the debt. This application will be returned without action if the computation is not included. See instructions website for examples.

a. ENTITLEMENT	b. DATE(S) (YYYYMMDD)	WAS PAID	SHOULD HAVE BEEN PAID	e. DIFFERENCE

25. DETAILED STATEMENT OF HOW AND WHY ERROR OCCURRED.

26. IS THERE ANY INDICATION OF FRAUD, MISREPRESENTATION, FAULT, OR LACK OF GOOD FAITH ON THE PART OF THE CLAIMANT?

YES (Explain) NO

27. STATEMENT AS TO WHETHER OR NOT THE CLAIMANT KNEW OR SHOULD HAVE BEEN AWARE OF RECEIVING AN ERRONEOUS PAYMENT. (Furnish facts and circumstances to support answer, state whether claimant received documents, and provide copies, if available. Use a separate sheet of paper if additional space is required.)

28. REMARKS (Attach a separate sheet of paper, if needed.)

29. RECOMMENDATION APPROVE PARTIAL \$ DENY

30. DESIGNATED FINANCIAL AGENT

a. SIGNATURE (Electronic or Handwritten/Typed not accepted) b. TITLE c. DATE SIGNED (YYYYMMDD)

31a. COMPLETE UNIT MAILING ADDRESS	31b. POINT OF CONTACT NAME	
e. ADSN/DSSN/UIC	31c. TELEPHONE	31d. DSN
	f. E-MAIL ADDRESS	

DFAS Notification Letter & Any Other Notices Received

TAB 2

COMPONENT LETTERHEAD

DATE

MEMORANDUM FOR JANE DOE

FROM: Component Human Resources Office

SUBJECT: Notice of Federal Retirement Plan Contribution Error

A recent review of your official personnel record revealed an error involving the retirement contribution code associated with your federal retirement plan. The error resulted in salary overpayment and corresponding debt to the federal government for underpayment of retirement contributions. This letter contains information about the error and the steps that will be taken to correct the error as well as the process to assess and address the likely debt.

There are three different Federal Employee Retirement System (FERS) programs with differing employee contribution rates: FERS, PERS - Revised Annuity Employees (FERS-RAE), and FERS - Further Revised Annuity Employees (FERS-FRAE). FERS requires an employee contribution rate of 0.8% of salary and generally covers employees appointed on January 1, 1984 through December 31, 2012. FERS-RAE requires an employee contribution rate of 3.1% of salary and covers employees appointed on January 1, 2013 through December 31, 2013. Finally, FERS-FRAE requires an employee contribution rate of 4.4% of salary and covers employees appointed on January 1, 2014 to present.¹

Your most recent Notification of Personnel Action (SF-50) indicates your retirement contribution code is:

Erroneous Code: **KR-FERS-RAE**

Your retirement contribution code should be reflected as:

Correct Code: **KF-FERS-FRAE**

From the date the coding error was made, you have been contributing:

Current Contribution Percentage: **3.1%-FERS-RAE**

each pay period, but you should have been contributing:

4.4%-FERS-FRAE

The net effect of this error is that you had less money deducted from your pay than was called for under your applicable FERS program, resulting in an overpayment of salary and underpayment of retirement contributions. We have corrected this mistake with a personnel action that will ensure contributions in future pay periods are accurate. The correction will also

¹ The referenced employee contribution rates reflect the regular FERS, FERS-RAE and FERS-FRAE contribution rates. For information regarding employee contribution rates for law enforcement officer, firefighter, air traffic controller and military reserve technicians, please consult your servicing human resources office.

address past actions up to the present day. After the correction to your personnel record is processed, the correct deduction will be used for all future salary payments.

Federal regulations require the DFAS Civilian Pay Office to notify employees of actions that may cause indebtedness. Separate from and in advance of that required notification, our office decided to provide you with this notice of the error and pending corrective action.

Our office has processed corrective actions through the Defense Civilian Personnel Data System to DFAS Civilian Pay; however, it may take some time to complete the process, since the actions require detailed processing by DFAS Civilian Pay.

You will receive notification from the DFAS Civilian Pay Office concerning the error. We recommend you contact the DFAS Civilian Pay Office at the number provided in their letter for information regarding any debt amount that is owed, payment plan options, and a debt challenge or waiver request process.

We regret the inconvenience this corrective process will cause you. If you have any documents disputing our determination, please share the information with the your HRO as soon as possible.

(Name)
Director, Component Human Resources

DFAS Debt Notification Letter

TAB 3



DEFENSE FINANCE AND ACCOUNTING SERVICE

Civilian Pay Cleveland

8899 East 56th St.
Indianapolis, IN 46249-1900

June 27, 2022

Jane Q. Doe
2020 Nowhere Lane
Indianapolis, IN 46201

Dear Ms. Doe:

This is to inform you that you were overpaid for pay period _____ to _____. The gross amount of your overpayment (including pay, taxes, benefits and other deductions) is \$ _____. DFAS has adjusted your debt for all payments and offsets and has determined that the net amount of the debt currently owed by you is \$ _____. The overpayment is a result of a Personnel change(s).

Payment of Your Debt. Please pay the debt in full by July 02, 2022, which is 30 days from the date of this letter. Payment options are explained in attachment 2 of this letter.

If You are Unable to Pay Your Debt in Full If you are unable to pay your debt in one lump sum, you may request to have your debt repayments offset from your salary. To participate in salary offset (payroll deductions), you must be an active employee receiving pay from DFAS, complete and sign the Voluntary Repayment Agreement (attachment 3), and submit it to DFAS. If you do not repay the debt in full, or do not submit the Voluntary Repayment Agreement within 30 days from the date of this letter, DFAS must collect the debt using other collection procedures. Beginning on July 02, 2022, DFAS will initiate collection of the debt involuntarily from your pay by using salary offset procedures. DFAS estimates that based on your current payroll information, your available disposable pay is \$1,745.13 and 15% of your disposable pay is \$261.77. Repayment of the principal amount of your debt would be completed in approximately 37 pay periods. If you retire or resign before your debt is paid in full, the entire amount of your final pay (salary and lump sum payments) may be applied to pay off your debt.

Opportunities Available to You If appropriate, you may contact your timekeeper to make time and attendance corrections, or your personnel office to make pay or allowance changes. You may inspect and/or receive copies of DFAS records related to your debt by contacting DFAS at the address above. If you question the validity or amount of your debt, you may request a hearing. If appropriate, you may request a waiver of your debt. You can find additional information on hearings and waivers at www.dfas.mil/civilianemployees/debt. DFAS will promptly refund to you any amounts you have paid or that were deducted for your debt which are later waived or found not owed to the United States Government.

Questions about Your Debt and Additional Information Please see the attached "Collection of Your Debt" in Attachment 1 for additional information regarding debt collection. The Department of Defense Financial Management Regulation (DoDFMR) contains general information concerning debt collection and is available at <http://comptroller.defense.gov/fmr/>. You may contact your Personnel Office or Customer Service Representative (CSR) if you have questions regarding your debt. If you have further questions about your debt, your CSR may initiate a customer inquiry via Remedy to request information from DFAS, or you may contact the DFAS Civilian Payroll Office at (800) 729-3277. You may also write to the DFAS Civilian Payroll Office at the address listed on this letter.

Thank you for the prompt payment of your debt.

Sincerely,

Brent R. Lang
Supervisor, Debt Processing

Enclosures: As stated

THIS FORM CONTAINS INFORMATION SUBJECT TO THE PRIVACY ACT OF 1974 AS AMENDED.

COLLECTION OF YOUR DEBT

Please be aware of the following additional information concerning the collection of your debt:

Interest and Additional Charges If you are unable to pay the debt in full within 30 days from the date of this letter, any unpaid portion of the debt will be considered delinquent. DFAS is authorized by law to add interest, penalties, and administrative costs to your debt if it is not paid within 30 days from the date of this letter. The rate of interest charged is at the Treasury Tax and Loan Rate and may commence on the date your debt becomes delinquent and may continue until the debt is paid in full. Additional penalties may be imposed at the rate of up to 6% a year on any unpaid portion of your debt that is delinquent for more than 90 days, commencing on the date your debt becomes delinquent and continuing until the debt is paid in full.

Collection Action on Delinquent Debts If DFAS is unable to collect your debt by salary offset, DFAS may enforce repayment of your debt by using other available collection remedies such as referring your debt to a private collection agency, reporting your debt to a credit bureau, garnishing your non-Federal employment wages, or referring your debt to the Department of Justice for litigation. Debts delinquent for more than 180 days are transferred to the Department of Treasury for collection. Treasury may offset your Federal income tax refunds or other Federal benefit payments, such as Social Security and Federal employee retirement benefits, in order to collect your debt. You may also be prohibited from being approved for a Federal loan if you do not resolve your outstanding delinquent debt.

Tax Considerations Pursuant to IRS Publication 15, income tax withheld by DFAS in a prior calendar year cannot be adjusted. Therefore, if your overpayment occurred in a prior calendar year, you must pay back the gross amount of your debt, including any taxes previously withheld and paid on your behalf to the IRS. You may be entitled to a deduction (or credit in some cases) for the repaid wages on your income tax return for the year of repayment of your debt. Each January, DFAS will issue a tax certificate for amounts repaid toward a prior year debt that can be used for tax filing. If your overpayment and repayment both occur in the same calendar year, DFAS will be able to adjust your tax withholding and you will be responsible for repaying only the net overpaid amount. Upon repayment in the same calendar year, your W-2 will be adjusted to reflect your income and the associated taxes. Finally, please be aware that should your debt repayment ever become delinquent and collected by the offset of your tax refund, your spouse may file Form 8379, Injured Spouse Allocation, with the Internal Revenue Service (IRS) to claim his or her share of the tax refund.

Collection of Federal Employee Health Benefit (FEHB) Premiums Your debt may be the result of your being on leave without pay status (LWOP) when your employer paid your FEHB premiums at your request. When you return to employment, or upon your pay becoming sufficient to cover the premiums, you are required to reimburse your employer for the premiums paid on your behalf. If you pay your debt with after-tax dollars using a personal check, the payment will not be subject to pre-tax treatment that would reduce your taxable income. In order to ensure the repayment will be treated on a pre-tax basis, you must select payroll deduction as your repayment method. Pursuant to OPM regulations under the 5 C.F.R. 890.502, the "catch-up" option for repaying your FEHB premiums may not be paid pursuant to a Voluntary Repayment Agreement. Premiums must be collected back each pay period at the rate your employer paid the premium for you.

Penalties for False or Frivolous Statements Please be advised that if you make or provide any knowingly false or frivolous statement, representations or evidence with respect to your debt, you may be liable for penalties under the False Claim Act (31 U.S.C. §§ 3729-3731) or other applicable statutes, and/or criminal penalties under 18 U.S.C. §§ 286, 287, 1001, and 1002, and other applicable statutes. A Federal employee may also be subject to disciplinary procedures under 5 U.S.C. Chapter 75 or any other applicable statutes or regulations.

Bankruptcy If you file for bankruptcy, you must notify DFAS as soon as possible.

Payment Options

1. Pay Your Debt in Full at Pay.Gov: Electronic payments are the most efficient way of ensuring your payment is posted to your payroll record quickly. You may make an electronic payment 24/7 online at the Federal Government's secure website Pay.gov, a website operated by the U.S. Treasury Department. If your online payment is less than the full amount, DFAS will automatically begin collecting the remaining balance at the rate of 15% of your net disposable pay through salary offset. To pay using Pay.Gov:

- a. Go to the Pay.Gov website. (<https://www.pay.gov/public/form/start/68842322>).
- b. You will need your bill ID ZGTN050722004233 when completing the Pay.Gov form.
- c. Maintain a copy of your receipt for proof of payment. You do not need to mail in a copy of the payment coupon to DFAS.

2. Payment by Installment through Salary Offset: If you are unable to pay the debt in one lump sum, you may agree in writing to pay the debt in regular installments by completing the enclosed Voluntary Repayment Agreement and mailing or faxing it to the address listed on the Agreement.

3. Lump Sum Payment by Check or Money Order: Follow the directions on the Payment Coupon below to pay your debt by check or money order. You must enclose the Payment Coupon below with your check/money order or your payment will be returned.

Questions? For questions regarding your debt, please contact your customer service representative or the DFAS Civilian Payroll Office at (800) PAY-DCPS. Thank you for your prompt payment!

For payment by check/money order - Please detach and include the Payment Coupon below.

.....

PAYMENT COUPON

Use this coupon to pay your debt in full by check or money order. To ensure your payment is applied to your account, YOU MUST ENCLOSE THIS COUPON WITH YOUR PAYMENT. Failure to include this payment coupon will result in your check/money order being returned to you. Return this coupon immediately to avoid salary offset from your pay.

- a. Prepare an envelope using the following address:

DFAS CLEVELAND DSSN 8522
ATTN:DISBURSING-JFMCB
1240 E 9TH STREET
CLEVELAND OH 44199

- b. Make your check/money order payable to: DFAS CLEVELAND ATTN:DISBURSING-JFMCB in the amount of \$9594.67

- c. Fill in the following information below:

Check or Money Order number: _____; Amount of Payment: _____.

Debt Information for DFAS:

Employee's Name EMPLOYEE Pay Blk 301 DB ZGT
Bill ID: ZGTN050722004233
Amount Owed \$9594.67
Estimated Deduction Amount 15% of net disposable per pay period \$261.77
Pay Period Deductions will begin 07/02/22
LOA ZGT DFASCL 97 2 0100.5600 - - - 044320 2D

THIS FORM CONTAINS INFORMATION SUBJECT TO THE PRIVACY ACT OF 1974 AS AMENDED.

Voluntary Repayment Agreement

Debt Information:

Employee's Name EMPLOYEE Pay Blk 301 DB ZGT
Bill ID: ZGTN050722004233
Debt Reason P
Sequence Number 00002
Amount Owed \$9,594.67
Estimated Disposable Net Amount \$1,745.13
Estimated Deduction Amount 15% of net disposable per pay period \$261.76
Pay Period Deductions will begin 7/2/2022
Code QA Debt Dates 05/12/18 through 04/09/22 Creation Date 05/07/22 LOA
ZGT DFASCL 97 2 0100.5600 - - - 044320 2D

Repayment Options and Where to Submit this Agreement. If you are an active employee receiving pay from DFAS and you agree to repay your debt by salary offset, please do the following:

- 1). Select a method of repayment from the 4 salary offset repayment options below;
- 2). Read the Acknowledgement below and sign this Agreement;
- 3). Return your signed Agreement to your payroll office - or - submit it to DFAS by FAX to (317) 275-0354 (DSN 699-366-0354) or (866) 401-5849, or by mail to DFAS-IN, Dept. 6200, Civilian Pay, 8899 East 56th St., Indianapolis, IN 46249-1900.

Select your method of salary offset repayment below (check one):

Single Payment. I wish to pay the total amount of the debt by salary offset in one payment. Please deduct the total amount from my salary on pay period ending _____.

Multiple Payments at 15% of Disposable Pay. I do not want to repay the debt all at once. I authorize DFAS to deduct the amount listed above (estimated to be 15% of my disposable pay per pay period) until the debt is paid in full.

Multiple Payments at More than 15% of Disposable Pay. I do not want to pay the debt all at once. I authorize DFAS to deduct \$_____ each pay period, which is more than 15 percent of my disposable pay, until the debt is paid in full.

Multiple Payments at Less than 15% of Disposable Pay. Payment at the rate of 15 percent of my disposable pay would result in an extreme financial hardship for me. I authorize DFAS to deduct \$_____ each pay period. This repayment amount has been approved by my employing agency. (**Signature of agency approving official/supervisor is required below). Please be advised your debt should be repaid within 3 years. In determining your proposed repayment amount, divide the amount due by 78 to determine the lowest biweekly payment; the minimum payment amount is \$25.00 per pay period.

Acknowledgement. I acknowledge that I owe the total amount indicated above due to an overpayment and I am obligated to repay the United States Government. I have selected a method of repayment above. I understand that in the event I select no method of repayment and I take no further action, 15% of my net disposable pay will be deducted automatically beginning with the pay period stated above. I understand if I decide to repay the amount owed by any method other than in a single lump sum payment, interest at the Treasury Tax and Loan rate may be charged on the unpaid balance every month until the debt is paid in full. In the event I default on my obligation under this Agreement, DFAS shall be entitled to terminate this Agreement without notice. Upon termination, DFAS will retain all amounts paid. Any unpaid balance of the debt will be automatically reinstated and will become immediately due and payable pursuant to law. DFAS will be entitled to take any lawful action it deems appropriate to collect the debt without duplicating notices and opportunities for review previously provided to me, whether before or after the date of this Agreement. I understand that DFAS maintains the discretion to reject an unacceptable proposed repayment Agreement and proceed with collection by salary offset at the rate of 15%. DFAS will notify me in writing in the event the repayment plan is unacceptable

I have read and fully understand and agree to the terms of this agreement.

Employee Signature: _____ Date: _____

Employee Phone (w/ area code): _____

**Approving Official/Supervisor's Signature (if required): _____ Date: _____

Approving Official/Supervisor's Printed Name _____

THIS FORM CONTAINS INFORMATION SUBJECT TO THE PRIVACY ACT OF 1974 AS AMENDED.

SF-50s for Entire Debt Period

TAB 4

Note: Your waiver request application should include SF-50s as required by instructions contained on Page 8 of this guide. Page 8 also includes instructions on how to obtain your SF-50s via your MyBiz or eOPF accounts.

Examples are not included here to help reduce file size and make the guide more manageable for you.

If the retirement code error occurred upon your initial appointment to Federal service, you do not have SF-50s from before the error occurred. If this applies to you, you will need to provide a statement explaining why you have no SF-50s to provide for the time period before the error. See the template provided in Appendix C or the sample on the following page.

12 August 2022

Jane Q. Doe
2020 Nowhere Lane
Indianapolis, IN 46201
jane.d.doe.civ@mail.mil

RE: Leave and Earning Statements and Standard Form 50s (SF-50) from Before the Error Occurred

Dear DFAS Civilian Pay Representative:

I understand that I am supposed to provide three Leave and Earning Statements (LES) and one Standard Form 50 (SF-50) for the time before the retirement coding error occurred.

In my case, this is not possible because these documents do not exist. The retirement code error occurred at the time of my initial appointment to Federal service on 15 November 2014. Therefore, there are no SF-50s or LESs in my personnel record that pre-date the retirement code error.

Thank you.

Sincerely,

Jane Q. Doe

Jane Q. Doe

LESs for Entire Debt Period

TAB 5

Note: Your waiver request application should include Leave and Earnings Statements (LES) as required by instructions contained on Page 9 of this guide. Page 9 also includes instructions on how to obtain your available LESs via your myPay account.

Examples are not included here to help reduce file size and make the guide more manageable for you.

Your waiver application request should include copies of all LESs issued during the entire debt period. You must also include three (3) LESs BEFORE the error occurred (if any), and three (3) LESs AFTER the correction to your retirement code was made (the deductions section of the LESs will show the retirement plan and code). You are **REQUIRED** to provide all LESs available via myPay. For LESs not available via myPay and not included in your digital or hardcopy files, you must provide a statement explaining, you had previous access to them but no longer have a copy.

If the retirement code error occurred upon your initial appointment to Federal service, you do not have LESs from before the error occurred. If this applies to you, you will need to provide a statement explaining why you have no LESs from this period. Statement templates are available in Appendix C and examples are shown in the following pages.

12 August 2022

Jane Q. Doe
2020 Nowhere Lane
Indianapolis, IN 46201
jane.q.doe.civ@mail.mil

RE: Missing Leave and Earning Statements

Dear DFAS Civilian Pay Representative:

I have included all Leave and Earning Statements (LES) I have in my possession (including all LESs available to me on myPay) in my waiver application package. I no longer have access to my LESs other than those attached to my waiver application.

I acknowledge receiving and/or having access to those Leave and Earning Statements in the past. The time periods are 15 November 2014 through 15 August 2021.

Thank you.

Sincerely,

Jane Q. Doe

Jane Q. Doe

Employee Statement Why Waiver Should Be Approved

TAB 6

12 August 2022

Jane Q. Doe
2020 Nowhere Lane
Indianapolis, IN 46201
jane.d.doe.civ@mail.mil

RE: Statement in Support of My Waiver Request

Dear DFAS Civilian Pay Representative:

I am applying for a waiver of the debt I incurred as a result of a retirement code error that <Component HRO> recently discovered in my service record. According to the information I received from <Component HRO>, I was incorrectly coded as regular FERS (K) when I should have been coded as FERS-FRAE (KF). According to my DFAS debt notification letter, the amount of the debt I now owe is \$8500.

I believe my waiver request meets the DoD standard for waiver and should be approved for the following reasons:

(State in detail all the reasons you feel your waiver should be approved)

Thank you for your consideration..

Sincerely,

Jane Q. Doe

Jane Q. Doe

Other Documents Referred to in Waiver Application

TAB 7

If you did not refer to any other documents in your application, **do not** include this tab in your waiver package

Witness Statements

TAB 8

10 August 2022

John A. Deer
Defense Finance and Accounting Service
8899 East 56th Street
Indianapolis, IN
john.a.deer.civ@mail.mil

Dear DFAS Civilian Pay Representative:

I am a Supervisory Public Affairs Specialist assigned with DFAS Indianapolis, IN. I am the first-level supervisor of Jane Q. Doe.

I confirm that on or about November 30, 2014, Ms. Doe asked me if her retirement code (FERS-K) was correct. I told Ms. Doe that her retirement code was correct and that she was under the correct FERSs retirement plan. Unfortunately I was incorrect.

I confirm the above statement is a true and correct summary of what I told Ms. Doe. If you have any questions regarding my statement I may be reached at john.a.deer.civ@mail.mil.

Thank you.

Sincerely,

John A. Deer

Other Documents in Support of Waiver Application

TAB 9

If you do not have any additional documents to attach in support of your waiver application (other than those already included), **do not** include this tab in your waiver package.