

MARINE CORPS SEPARATION AND RETIREMENT MANUAL

APPENDIX E

AUTOMATED PROCESSING OF SEPARATION AND RETIREMENTS UNDER THE MARINE CORPS TOTAL FORCE SYSTEM (MCTFS)

E001. SCOPE. These procedures apply to all Marines, officer and enlisted, serving in the Regular Marine Corps, and to members of the Marine Corps Reserve. It also applies to Marines on the Retired list, on the Reserve Retired List Awaiting Pay at Age 60, in the Fleet Marine Corps Reserve (FMCR), and on the Temporary/Permanent Disability Retired List (TDRL/PDRL). For the purposes of this appendix, the term "separation" includes retirements and transfers to the FMCR, TDRL and PDRL, unless specified otherwise.

E002. PURPOSE. To provide procedures for effecting separations for Marines of the Regular and Reserve components and to support the Defense Retiree and Annuitant Pay System (DRAS). Noncompliance with these procedures can result in non-payment of retired pay to retired Marines. Additionally, new procedures are provided for effecting separations and retirements for Marines of the Regular and Reserve components, per pertinent paragraphs of this Manual. Accordingly, it is imperative that commanders fully understand the impact of DRAS on the quality of life of retired Marines and their families.

E003. BACKGROUND

1. On 18 June 94, the Retired Pay and Personnel System (RPPS) resident at the Defense Finance and Accounting Service, Kansas City Center (DFAS-KC), Retired Pay Division (Code FJR) was frozen and all existing retired Marine and Survivor Benefit Plan (SBP) annuitant pay accounts underwent conversion to DRAS.

2. Effective 1 August 94, DFAS-KC (FJR) transferred responsibility for the processing and payment of retired Marines and SBP annuitants to DFAS, Cleveland Center (DFAS-CL) and DRAS, Denver Center (DFAS-DE), respectively.

3. Retired Marine pay accounts will be maintained in the Retiree and Casualty Pay System (RCPS) at DFAS-CL and SBP annuitants in the Annuitant Pay System (APS) at DFAS-DE. Data on retired Marines and SBP annuitants will be transmitted electronically via an extract from the Marine Corps Total Force System (MCTFS). DRAS information will, in turn, be fed back to MCTFS and the two systems will be periodically reconciled.

4. During Test Cycle 2-94, MCTFS was modified to incorporate necessary separation and retirement information and screens were created in the MCTFS menu under option "RETM" in the KC menu. All the data necessary to establish a retired pay account at DFAS-CL will be resident in MCTFS.

5. Security Access. Personnel who require on-line access to DRAS should immediately contact their local terminal area security officer (TASO).

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6. Changes to MCTFS in support of DRAS were disseminated via MCTFS Test Cycle Notice 1-94.

E004. ADMINISTRATION. Below is a brief summary of the process.

1. General

a. All requests for separation for both Regular and Reserve Marines, which do not require waiver of eligibility criteria will be submitted via unit diary 4 to 14 months from the desired date of separation. A request run on the unit diary does not ensure receipt by the CMC. Requests for waiver of the established criteria per pertinent chapters of this Manual must be submitted via separate correspondence or naval message. Requests for special programs, e.g., TERA and the Reserve Transition Benefits Program, also require separate correspondence.

b. The CMC will "acknowledge receipt" by providing a unit diary advisory to the requesting unit, indicating a request has been received and is in staffing, i.e., pending. If this advisory is not received within 10 working days from the date of submission of the request, notify the CMC (MMSR).

c. Approval authority will be issued via the unit diary system by providing the responsible command/parent unit with an advisory in MCTFS indicating the separation has been approved. Upon receiving approval authority, issue orders using information available in MCTFS. Approval is not granted, nor is the information in MCTFS verified, until the unit diary approval advisory is received by the responsible command/parent order writing unit. All authority to release, all disapprovals, and all requests held in abeyance will be issued exclusively via the unit diary.

d. Disapprovals will be transmitted via unit diary except when the request is endorsed by a general officer. These will receive a response via separate correspondence.

e. Requests for withdrawal of a separation request, for both Regular and Reserve Marines, will continue to be submitted via separate correspondence with appropriate justification and command endorsements per pertinent paragraphs of this Manual and will be considered on a case-by-case basis.

f. Letters, certificates, and other separation documents will be forwarded by the CMC (MMSR) via separate correspondence within 10 working days of unit diary approval.

g. Commanders shall separate the Marine on the approved date and shall effect the proper unit diary transaction (the drop) within three calendar days of the separation.

(1) Each month, 10 days before the end of the month, command and parent RUC's will receive a unit diary advisory alerting them to pending

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retirements (includes transfer to the FMCR, PDRL and TDRL) at the end of the current month or beginning of the following month.

(2) If the unit drop transaction rejects for any reason, the unit must research the error identified and rerun the drop correctly. Any problems the unit cannot resolve should be identified to the local MISSO, and subsequently to the CMC (MMSR) if the problem remains unresolved. (Note: The drop transaction that triggers initiation of retired pay.)

h. The Retired Pay Data Form, DD Form 2656, must be completed by the Marine and spouse, if appropriate, and forwarded by the command to DFAS-CL 30 days prior to the approved retirement date. Failure to do so will automatically enroll the Marine in SBP at full coverage.

i. Marines should be advised that once retired, they should contact the CMC (MMSR-6), Retired Activities Section (1-800-336-4649) on any retiree matter of concern to them, or when they are unable to obtain necessary information/action from DFAS or any other government agency. Contact the Retired List Maintenance Section (MMSR-7 at 1-800-715-0968) for pay problems, or updating address or family member information.

2. Submission of Requests for Separation or Retirement

a. Requests will continue to be submitted via the unit diary as the primary means. Requests must be submitted between the 4 to 14 month window currently established. Requests outside this window will be rejected by the MCTFS.

b. Requests requiring a waiver of the established criteria in this Manual must still be submitted via separate correspondence, i.e., naval message or Administrative Action Form with justification, command endorsements and recommendations.

c. In keeping with the Total Force concept, primary means for submission of requests for the separation and retirement of members of the Marine Corps Reserve, not requiring a waiver of the established criteria in this Manual, will also be submitted via unit diary.

d. Disability separations and retirements are never requested and are always the result of Physical Evaluation Board (PEB) proceedings.

3. Withdrawal/Modification. Requests for withdrawal/modification of a resignation/retirement request, for both Regular and Reserve Marines, will continue to be submitted via separate correspondence with appropriate justification and command endorsements, per pertinent paragraphs of this Manual. Requests will be considered on a case-by-case basis.

4. Disapprovals. Disapprovals will be issued via the unit diary except when the request is endorsed by a general officer. A brief flow-through history statement will be provided when the disapproval is run on the diary. The disapproval will post an appropriate RER flag to the RER data field in the MCTFS.

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5. Approval Authority. Approval authority will be issued by the CMC (MMSR) via the unit diary in the MCTFS.

a. The unit diary transaction will generate an appropriate RER flag to the RER data field.

b. Approval is not granted prior to the RER flag reflecting approval in MCTFS.

6. Separation Orders. Once approval authority is received on the parent reporting unit code (RUC) and command reporting unit code (CRUC) diary feedback report (DFR), the responsible order writing unit may issue separation/retirement orders per appropriate figures in this Manual. Use the unit diary approval transaction and the information contained in the RETM screens in MCTFS.

a. The parent unit need no longer wait for written "authority to release" from the CMC (MMSR).

b. Naval messages and written orders are no longer issued except on a "by exception" basis as prescribed within pertinent sections of this Manual.

c. The RETM screens contain all the necessary information.

E005. RETM SCREENS. Eight screens are available in MCTFS containing all necessary information to issue separation and retirement orders once the approval authority is received via the unit diary from the CMC (MMSR). The information on the screens will be used in place of information formerly provided in the "authority to release" message.

1. Screen 1 (Option RT01 - Personal Information Screen). This screen provides general information on the Marine requesting action. It includes, along with other pertinent information, the appropriate:

a. Authority (AUTH) paragraph from this Manual.

b. Planned separation program designator code (PLANNED SPD). (Note: Failure to use the planned SPD code provided by the CMC (MMSR) will result in a rejected unit diary drop transaction (TTC 378) and non-payment of the Marine.)

c. Planned characterization (PLANNED CHAR). (Note: See subparagraph E005.1b above.)

d. Mandatory separation/retirement (MSR) date, if applicable. This field, if populated, provides the statutory (required by Title 10, U.S. Code) date, which is the latest possible date a Marine can lawfully retire/separate.

2. Screen 2 (Option RT02 - Service Computation Data Screen). This screen provides the following service information.

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- a. A summary statement of service (SOS).
 - b. The appropriate separation or retirement law.
 - c. This screen will also contain the bulk of information for issuance of orders for Regular Marine nondisability separations, retirements, and transfers FMCR. Portions of this screen are also used with disability separations and retirements and Reserve retirements.
3. Screen 3 (Option RT03 - Disability Data Screen). This screen provides the following disability data.
- a. Percent disability (PERCENT DSBL).
 - b. Mental incompetency (MENTAL INCOMP).
 - c. Combat disability (COMBAT DSBL).
 - d. VA codes (VA CODES).
4. Screen 4 (Option RT04 - Reserve Data Screen). This screen provides information for issuing orders and effecting inactive Reserve separations and retirements. It includes the following data.
- a. Service computation information, e.g., anniversary date (ANNIV DATE), retirement points (TOTAL RET POINTS), total satisfactory years (TOT SAT YEARS), etc.
 - b. The mandatory removal date (MAND REMOVAL DATE)
 - c. Date first eligible to retire (DATE 1ST ELIG RET)
 - d. RCSBP election information (RCSBP DATE, RCSBP OPTION, RCSBP TYPE CVG, RCSBP LEVEL, RCSBP AMT CVG).
5. Screen 5 (Option RT05 - Location Data Screen). This screen provides the following.
- a. Unit address.
 - b. Home address.
 - c. Home and work phone numbers.
 - d. Military service number and prior SSN.
6. There is no screen 6 (RT06) option.
7. Screen 7 (Option RT07 - Career Retirement Credit Report). This screen is self-explanatory. It is for Reserve use only and is imported to the RETM screens for ease of use.

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8. Screen 8 (Option RT08 - Annual Retirement Credit Report (Current)). Same as paragraph E005.7 above.

9. Screen 9 (Option RT09 - Annual Retirement Credit Report (Prior)). Same as paragraph E005.7 above.

E006. DETAILED PROCEDURES. The following paragraphs provide detailed procedures and are divided into three categories of separations and retirements: (1) Regular, (2) Reserve, and (3) Disability.

1. Regular Separations and Retirements. These procedures apply to Regular officers and enlisted Marines, and those Reservists in the Active Reserve (AR) program with 20 years of creditable active service. They also apply to requests for transfer FMCR.

a. The unit diary type transaction code (TTC) active duty separations, retirements and transfers listed in MCTFS Test Cycle Notice 1-94 of 5 May 94. Unit diary requests which are properly run will generate the following.

(1) An appropriate RER flag showing that the request has been accepted in the MCTFS.

(2) Service computations based on what is resident in MCTFS. This computation is not validated until audited by the CMC (MMSR) and an approval transaction has posted.

(3) Units must be careful to run the correct TTC to reflect the requested action, e.g., resignation requests can be submitted with or without a Reserve commission. If an officer has obligated service remaining, a Reserve commission must be executed to complete that obligation, unless needs of the service dictate otherwise.

b. Once the request is received by the CMC (MMSR), a "request pending" transaction will be run by the CMC.

(1) This transaction will:

(a) Post an appropriate RER flag to the RER data field in MCTFS,

(b) Post a PRR date to the PRR data field in MCTFS (may be different from the date requested), and

(c) Issue feedback on the parent reporting unit code's (RUC's) DFR.

(2) The "pending" RER flag is the CMC's "acknowledge receipt" of the action requested.

(3) Once the unit sees that a request has posted to the diary, if a pending RER flag is not received back on the parent RUC's DFR within 10 working days, the unit should immediately contact the CMC (MMSR). A requested

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action posting on the parent unit's DFR does not implicitly indicate similar posting on the CMC's DFR. Accordingly, working the DFR for errors and follow-up action on requests is critical.

c. Approval Authority/Authority to Release. The "authority to release" is issued via unit diary. The data to be used to produce orders per appropriate figures in this Manual can be found in the RETM screens. In some cases authority will be issued via naval message or separate correspondence.

(1) The approval authority granted by the CMC will:

- (a) Be transmitted via unit diary approval transaction;
- (b) Post an appropriate RER flag in MCTFS;
- (c) Post an approved date to the PRR data field of MCTFS (may be different from the date requested);
- (d) Validate all service information;
- (e) Provide a flow-through history statement granting approval of an extension of enlistment, when required to reach the PRR date; and
- (f) Send a skeleton record to the DFAS-CL advising them of the upcoming action (retirements and transfers FMCR only).

(2) For Regular officer retirements and enlisted 30 year retirements. The PRR date is the first day on the Retired List. The PRR minus 1 day is the last day of active duty and the day (at midnight) on which all active duty pay and allowances terminate.

(3) For enlisted transfers FMCR. The PRR date is the last day of active duty and the day (at midnight) on which all active duty pay and allowances terminate.

(4) For Reserve (AR) retirements. The PRR date is the first day on the Retired List. The PRR minus 1 day is the last day of active duty and the day (at midnight) on which all active duty pay and allowances terminate.

(5) For all resignations. The PRR date is the last day of active duty and the day (at midnight) on which all active duty pay and allowances terminate.

d. Disapproved Requests (or Requests to Withdraw That Are Approved). This action is run on the diary by the CMC (MMSR) and will zero all retirement-related data fields in MCTFS. It will also restore the ECC date to the previous date. This transaction will also notify the DFAS-CL of the cancellation (retirements/transfers FMCR only).

e. Appropriate retirement/transfer FMCR certificates and letters will be sent via separate correspondence within 10 working days of the approval authority being issued.

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2. Inactive Reserve Separations and Retirements. These procedures apply to Reserve officers and enlisted Marines in the SMCR or IRR with 20 years of qualifying service, who meet the criteria to separate or retire.

a. The unit diary TTC numbers for requesting Reserve separations and retirements have changed and are listed in the MCTFS Test Cycle Notice 1-94. Unit diary requests which are properly submitted will generate:

(1) An appropriate RER flag showing that the request has been accepted in the MCTFS.

(2) Service computations based on data resident in MCTFS. Proper certification of the CRCR by the Marine is critical to the success of this process. This computation is not validated until audited by the CMC (MMSR-5) and an approval transaction has posted.

(3) Units must be careful to run the correct TTC to reflect the requested action. If an officer has obligated service remaining, a Reserve commission will be required to complete that obligation, unless needs of the service dictate otherwise.

b. Once the request is received by the CMC (MMSR), a "request pending" transaction will be run by the CMC.

(1) This transaction will:

(a) Post an appropriate RER flag to the RER data field in MCTFS,

(b) Post a PRR date to the PRR data field in MCTFS (may be different from the date requested), and

(c) Issue feedback on the parent RUC's DFR.

(2) The "pending" RER flag is CMC's "acknowledge receipt" of the action requested.

(3) Once the unit sees that a request has posted to the diary, if a pending RER flag is not received back on the parent unit's DFR within 10 working days, the unit should immediately contact the CMC (MMSR-5). A requested action posting on the parent unit's DFR does not implicitly indicate similar posting on the CMC's DFR. Accordingly, working the DFR for errors and follow-up on requests is critical.

c. Approval Authority/Authority to Release. The "authority to release" is issued via unit diary. The data to be used to produce orders per appropriate figures in this Manual can be found in the RETM screens. In some cases authority will be issued via naval message or separate correspondence.

(1) The approval authority granted by the CMC will:

(a) Be transmitted via a unit diary approval transaction;

(b) Post an appropriate RER flag in MCTFS;

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(c) Post the approved date to the PRR data field of MCTFS (may be different from the date requested); and

(d) Unless a Marine is drilling up until the 60th birthday, a skeleton record will not be sent to the DFAS-CL advising them of the upcoming retirement until receipt of a request to retire with pay at age 60 is received from the Marine by the CMC (MMSR-5).

(2) The PRR date for retirement with pay is the 60th birthday which is the first day on the Retired List.

(3) The PRR date for retirement awaiting pay at age 60 is the first day of the month, and is also the first day on the Retired List Awaiting Pay.

(4) For all inactive Reserve resignations, the PRR date can be effected on any day the member is under valid contract or extension agreement.

d. Disapproved Requests (or Requests to Withdraw That Are Approved). This action is run on the diary by the CMC (MMSR) and will zero all retirement-related data fields in MCTFS. It will also restore the ECC date to the previous date. This transaction will also notify DFAS-CL of the cancellation (retirement with pay at age 60 only).

e. Appropriate retirement certificates and letters will be sent via separate correspondence within 10 working days of the approval authority being issued.

3. Disability Separations and Retirements. These procedures apply to all officer and enlisted Marines being retired or separated by reason of disability.

a. The unit diary TTC numbers for processing disability separations and retirements are new and are listed in the MCTFS Test Cycle Notice 1-94. Disability separation/retirement is the result of PEB processing, so no unit diary request TTC's are provided.

b. Approval Authority/Authority to Release. The "authority to release" is issued via unit diary. The data to be used to produce orders per appropriate figures in this Manual can be found in the RETM screens. In some cases authority will be issued via naval message or separate correspondence.

(1) The approval authority granted by the CMC will:

(a) Be transmitted via unit diary approval transaction;

(b) Post an appropriate RER flag in MCTFS;

(c) Post an approved date to the PRR data field of MCTFS (This date may be different from the date requested.);

(d) Provide necessary disability information; and

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(e) Send a skeleton record to the DFAS-CL advising them of the upcoming action (retirements only).

(2) For all disability separations and retirements for Regular and Reserve Marines, officers and enlisted, the PRR date is last day on active duty (midnight) on which all active duty pay and allowances terminate.

c. Appropriate retirement/separation certificates and letters will be sent via separate correspondence within 10 working days of the approval authority being issued.

E007. COMMANDING OFFICER RESPONSIBILITIES

1. Run the proper unit diary drop transaction (TTC 378) within 3 calendar days of separation. Ensure the transaction processes without error by reviewing and taking action on your diary feedback reports. A chapter in the PRIM (Active and Reserve) and chapter 8 of the MCTFSPRIM address the cycle feedback reports (DSR - DFR - advisories/PUREX).
2. Ensure that a permanent mailing address (PMA), action dated one day prior to the drop, is entered in MCTFS for these individuals. If not action dated, the address will not be picked up by the drop entry and transferred to DFAS-CL. DFAS-CL, by law, cannot issue retired pay without a valid PMA.
3. At least 60 days prior to retirement, adjust all allotments to reflect the allotments and quantities the Marine desires as a retiree. Ensure allotments do not exceed projected retired pay. The Retired Pay Data Form (DD Form 2656) can no longer be used to change allotments when a Marine retires. Failure to do the preceding could result in negative net pay and allotments being stopped by the DFAS.
4. Forward the DD Form 2656 to the DFAS-CL not later than 30 days prior to the retirement date. Forwarding of this form is no longer the responsibility of the individual Marine; the commanding officer is responsible for forwarding the form to the DFAS. Without the DD Form 2656, the DFAS will maximize deductions for tax purposes and for the Survivor Benefit Plan (SBP) coverage.
5. Immediately, but not later than 30 days prior to the approved separation date, notify the CMC (MMSR) if a Marine who is approved to separate will not do so on the approved date. For retiring Marines, the Marine will be dropped by the CMC absent a naval message or request by the unit for modification. This could result in overpayment/underpayment of active duty and retired pay.
6. Prior to submitting a request for separation, ensure that all time lost and constructive service time is accurately reflected in MCTFS, per the PRIM.