



Veterans' Benefits

Patrick M. Charles | Deputy General Counsel | PERAC
May 25, 2023

Who Qualifies as a Veteran?

(1) G.L. c. 4 s. 7 cl. 43rd 1st paragraph

- a) **Wartime Service** — “Persian Gulf veteran” shall mean any person who performed such wartime service during the period commencing August 2, 1990 and ending on a date to be determined by presidential proclamation or executive order and concurrent resolution of the Congress of the United States.
- b) 90 days one of which is wartime service, unless during wartime a person receives a service-connected disability, purple heart or dies.
- c) 180 days active service in the Army, Navy, Marine Corps, Coast Guard or Air Force and was honorably discharged (c.116 of the Acts of 2004).

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Not a Veteran Clause 43rd

- ❖ Discharged on his own application because an enemy alien.
- ❖ Guilty of willful desertion.
- ❖ Only service consists of coast guard, auxiliary or temporary coast guard reserve.
- ❖ Dishonorable discharge.

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NOTES:

Veteran's Health Care and Benefits Improvement Act of 2016

- ❖ Provides that a member of the National Guard who serves for 20 years will now be considered a veteran.
- ❖ NOT SO FAST!
- ❖ This act only applies to Federal Veterans Benefits and does not change the definition of "Veteran" for c. 32.

4

Creditable Service For Military Leave

- ❖ Mandatory creditable service for military leave under G.L. c. 32, s. 4(1)(h)
- ❖ c. 708 of the Acts of 1941
- ❖ USERRA

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NOTES:

G.L. c. 32, s. 4(1)(h)

- h) The period or periods during which any member who is a veteran as defined in section one was on leave of absence from the governmental unit to which the system of which he is a member pertains, for the purpose of serving in such campaign and until he was discharged or released from such service in the armed forces, shall be allowed as creditable service.
- Any such period of leave of absence which is subsequent to his becoming a member of such system shall be counted as membership service, and any such period prior thereto shall be counted as prior service; provided, that he would have been entitled to such credit in the event he had continued in the active service of such governmental unit during the period of time covered by such leave of absence.

(Cont'd)

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G.L. c. 32, s. 4(1)(h) (Continued)

- Any member who served in the armed forces between January first, nineteen hundred and forty and the termination of the Selective Service Act of 1948, shall have such actual service credited to him as creditable service when **reinstated or reemployed** in his former position or in a similar position or when employed in any governmental unit in a position which is subject to the provisions of sections one to twenty-eight, inclusive, within two years of his discharge or release from such service; provided, however, that such service shall not be construed to include service for more than four years unless such further period of service in excess of four years was involuntary service required by the government of the United States or unless such service in excess of four years was rendered prior to July first, nineteen hundred and sixty-four and such member was reinstated or reemployed on or before June thirtieth, nineteen hundred and sixty-six. The provisions of sections nine and nine A of chapter seven hundred and eight of the acts of nineteen hundred and forty-one, as amended, and as may be further amended, shall be applicable to any person referred to in section one of said chapter seven hundred and eight who is a member of any retirement system established under the provisions of this chapter whose last discharge or release from military service was under honorable conditions as defined in defense department regulations

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NOTES:

How Much Service Can a Member Be Given Under s.4(1)(h)?

- ❖ S. 4(1)(h) provides:
 - that such service shall not be construed to include service for more than four years unless such further period of service in excess of four years was **involuntary** service required by the government of the United States.
- ❖ Member can receive up to 4 years regardless of whether they voluntarily agree to the activation.
- ❖ If they volunteer for active duty in excess of 4 years, they are not given the creditable service, however they may be able to buy the excess time under the 4th paragraph of s. 4(1)(h).

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Special Fund For Military Service Credit

- ❖ **G.L. c. 32 s. 22(7)** – board must calculate the amount of reg. deductions members on military leave would have paid into the system.
- ❖ **G.L. c. 32 s. 22(4)(b)** – if member retires or dies prior to retirement w/eligible beneficiary under s.12(2)(d) the amount in special military fund plus interest should be added to the member's accumulated regular deductions and then used to determine the amount of annuity payable under c.32 s. 12(2).

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NOTES:

Special Fund

- ❖ If member withdraws or dies prior to retirement with no member-survivor allowance payable under s. 12(2)(d) or benefits payable under s. 12B then the amount in special fund is used to reduce the amount of the appropriation of the governmental unit(s) that paid to establish the military service credit.

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Special Fund *(Continued)*

- ❖ If member is later reinstated or joins another system and re-deposits his or her accumulated deductions, then the gov't unit must transfer the amount originally transferred to the pension fund plus regular interest back to the special fund.
- ❖ G.L. c. 32, s. 22(4)(d) member with military service credit transfers membership to another system – transfer of funds from system 1 to system 2 upon retirement or death with eligible survivor benefits.

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NOTES:

Purchase of Up To 4 Years

❖ c.32, s. 4 (1)(h)

- Notwithstanding the provisions of this chapter or any other general or special law, rule or regulation to the contrary, **a member in service** of a retirement system as defined in section one who is a veteran who served in the armed forces of the United States shall be entitled to credit for active service in the armed services of the United States; provided, however, that such active service shall not be credited until such member has paid into the annuity savings fund of such system, in one sum or in installments, upon such terms and conditions as the board may prescribe, makeup payments, for each year of creditable service sought, of an amount equal to the ten percent of the regular annual compensation of the member when said member entered the retirement system; and, provided further that such creditable service shall not be construed to include service for more than four years provided further, that such creditable service shall not be allowed for any period of active service for which said veteran has received credit pursuant to paragraph (h) of subsection (1) of section 4 of chapter thirty-two of the General Laws. This act shall apply to National Guard and Active Reserve personnel, both former and present. Creditable service time, both enlisted and commissioned may be applied toward retirement on a ratio of five years guard service or five years active reserve service substitutable for each year of active service.(Emphasis added).

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Purchase of Up To 4 Years *(Continued)*

❖ Purchase of up to 4 years of prior military service

- a) 10% of regular compensation when the member most recently established membership in the system.
- b) 5 to 1 ratio for national guard and active reserve time **MUST** qualify as a veteran.
- c) active duty leave time **cannot** be counted towards buyback.
- d) member has 180 days from notice to begin purchase process.
- e) active duty for training for the Nat. Guard and Reserves is excluded.
- f) requirement of 10 years of service before buyback was removed by c. 468 of the Acts of 2002.
- g) must be a member in service.

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NOTES:

Prior Active Duty and National Guard Leave For Active Duty

- ❖ Member may have prior active duty of less than 4 years which he is eligible to purchase.
- ❖ Member may be a member of the reserves or National Guard and may be eligible to purchase additional time at the 5 to 1 ratio.
- ❖ Can do 2 buybacks.

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National Guard and Reserves

- ❖ S. 4(1)(h) applies to former and present members of the National Guard and Reserves.
- ❖ What about s. 4(1)(a): in no event shall he be credited with more than one year of creditable service for all such membership service rendered during any one calendar year.

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NOTES:

What Salary Do You Use?

- ❖ 10% of the regular annual compensation of the member when said member entered the retirement system.
- ❖ If member withdrew funds from one system and then seeks to buy vet time in your system, you use salary when he started your system.
- ❖ If transfer of funds use salary at 1st system.

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When Does the Member Have To Pay?

- ❖ Must begin process within 180 days of notice.
- ❖ Can board allow someone to wait until close to retirement to buy the time?
- ❖ Can board require lump sum payment?
- ❖ Can board allow payment plan?
- ❖ Should board adopt a regulation detailing policy?
- ❖ Can the board adopt a regulation requiring interest if member doesn't pay in lump sum?

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NOTES:

What If the Member Doesn't Complete Buyback and Transfers Systems?

- ❖ *Belmont v. Wellsley, PERAC and CRAB*; CR-06-0733 (2009).
- ❖ Money should be returned to member and then they start new purchase in second system.
- ❖ Can system A transfer money to system B rather than refund?

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Military Pay Act c. 137 of the Acts of 2003

- 1) Member is paid difference between their salary and their military pay while on active-duty leave.
- 2) These payments are considered regular compensation and contributions should be taken,
 - (a) memo 39 of 2001
 - (b) lowers amount political subdivision must pay into special fund for military service credit.

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NOTES:

Local Military Pay Acts

- ❖ Some municipalities have passed home rule petitions that provide the same benefits as the Military Pay Act.
- ❖ One municipality passed one that doesn't require a reduction in employee pay for military pay.
- ❖ Make sure you are aware of any special acts in your member towns.

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Heroes Earnings Assistance and Relief Tax Act (Heart Act)

- 1) 840 CMR 3.10 Regulations apply to members who have been:
 - (a) killed on active duty
 - (b) disabled while on active duty
 - s. 12 benefit accrual and creditable service towards ordinary disability

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NOTES:

Heart Act – Regulations and Memo

- ❖ Amendments to 840 CMR 3.07 and 3.10 effective on November 22, 2013.
- ❖ PERAC Memo #34 of 2013.

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Heart Act – What Do Boards Need To Do?

- ❖ Board should try to identify any members who:
 - Died while on active-duty military leave,
 - Were disabled while on active duty leave and unable to return to work.
- ❖ Contact member or beneficiary and determine what, if any, additional benefits available.

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NOTES:

Heart Act – Additional Benefits

- ❖ G.L. c. 32, s. 12(2)(d) benefit amount may need recalculation to reflect increases in creditable service.
 - Beneficiary CANNOT utilize the make-up payment provision of s.12(2)(d) to purchase s.4(1)(h) time.

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Heart Act – Disabled Member

- ❖ If denied creditable service for failure to be reinstated member may now be eligible for benefits.
- ❖ If accumulated deductions withdrawn b/c not enough time for ordinary or superannuation member should be allowed to redeposit funds and any funds transferred from special military Reserve Fund should be redeposited.

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NOTES:

Section 5 of Chapter 218 of the Acts of 2018

❖ **SECTION 5.** Subdivision (1) of section 4 of chapter 32 of the General Laws, as so appearing, is hereby amended by inserting after paragraph (r) the following paragraph:-

- (r½) Notwithstanding any general or special law to the contrary, a member in service who: (i) served in the United States Public Health Service Commissioned Corps or the National Oceanic and Atmospheric Administration Commissioned Officer Corps; (ii) has completed not less than 4 years of membership service; and (iii) has retired or will retire on or after January 1, 1975 shall receive full credit for the period of such service; provided, however, that such a member shall receive credit for not more than 4 years of that service. Eligibility for the creditable service of members in service shall be conditioned upon payment into the annuity savings fund of the applicable retirement system, in 1 sum or in installments upon such terms as the applicable retirement board may provide, of an amount equal to the contributions that a member would have otherwise paid into the retirement system plus buyback interest thereon for the period of commissioned corps service based upon the annual salary the member received in the first year of membership service after the member's commissioned corps service.

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Who is Covered By This Law?

- ❖ **United States Public Health Service Commissioned Corps:** More than 6,500 Commissioned Corps officers work on the front lines of public health - fighting disease, conducting research, and caring for patients in underserved communities. Corps officers serve in 15 careers in a wide range of specialties within Federal agencies such as the National Institutes of Health (NIH) and the Centers for Disease Control and Prevention (CDC).
- ❖ **National Oceanic and Atmospheric Administration Commissioned Officer Corps:** The NOAA Commissioned Officer Corps (NOAA Corps) is one of the nation's seven uniformed services. NOAA Corps officers are an integral part of the National Oceanic and Atmospheric Administration (NOAA), an agency of the U.S. Department of Commerce, and serve with the special trust and confidence of the President. With 321 officers, the NOAA Corps serves throughout the agency's line and staff offices to support nearly all of NOAA's programs and missions.

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NOTES:

Chapter 218 and Veteran Status

- ❖ Members who served in the United States Public Health Service Commissioned Corps or the National Oceanic and Atmospheric Administration Commissioned Officer Corps were not added to the definition of Veteran in Chapter 4 of the General Laws.
- ❖ Not eligible for the provisions of G.L. c. 32, s. 4(1)(h).
- ❖ Not eligible for the increased Ordinary Disability benefit.
- ❖ Not eligible for the \$15 per year for each year of creditable service up to \$300 contained in Sections 5, 7 or 26 of Chapter 32.

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Ordinary Disability Benefits

- 1) Veteran with 10 years of service = 50% disability pension
 - can use veteran buyback to reach 10 years

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NOTES:

Other Veteran Benefits

- ❖ Group 1, 2, and 4 veterans receive \$15 per year for each year of creditable service up to \$300 [G.L. c.32, s.5 (2)(b) and s. 7(2)(e) c. 157 of 2005].
- ❖ Group 3 veterans retired under G.L. c. 32, s.26 receive \$15 per year for each year of creditable service up to \$300.

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80% Limitation In G.L. c.32, s.5(2)(c)

- ❖ The Veterans benefit of up to \$300 per year is added to the retirement allowance after the 80% limit is calculated.
- ❖ Member's allowance can exceed 80% when the veterans' benefit is added.

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NOTES:

SLIDE 32: NOT A VETERAN – TRAINING (FORM A)

CAUTION: NOT TO BE USED FOR
IDENTIFICATION PURPOSESTHIS IS AN IMPORTANT RECORD.
SAFEGUARD IT.ANY ALTERATIONS IN SHADED AREAS
RENDER FORM VOID

CERTIFICATE OF RELEASE OR DISCHARGE FROM ACTIVE DUTY

This Report Contains Information Subject to the Privacy Act of 1974, As Amended.

1. NAME (Last, First, Middle) [REDACTED]		2. DEPARTMENT, COMPONENT AND BRANCH ARMY/ARNGUS		3. SOCIAL SECURITY NUMBER [REDACTED]																																									
4a. GRADE, RATE OR RANK PV1	b. PAY GRADE E01	5. DATE OF BIRTH (YYYYMMDD) [REDACTED]	6. RESERVE OBLIGATION TERMINATION DATE (YYYYMMDD) 20211029																																										
7a. PLACE OF ENTRY INTO ACTIVE DUTY BOSTON, MASSACHUSETTS		b. HOME OF RECORD AT TIME OF ENTRY (City and state, or complete address if known) [REDACTED]																																											
8a. LAST DUTY ASSIGNMENT AND MAJOR COMMAND E BTRY (1-78 FA) STUD TC			b. STATION WHERE SEPARATED FORT SILL TC, OK 73503-5100																																										
9. COMMAND TO WHICH TRANSFERRED HHC 1/182ND INF REG (WPUGT0) 120 MAIN ST, MELROSE, MA 02176			10. SGLI COVERAGE AMOUNT: \$ 400,000.00																																										
11. PRIMARY SPECIALTY (List number, title and years and months in specialty. List additional specialty numbers and titles involving periods of one or more years.) 13F10 FIRE SUPPORT SPECIALI - 00 YRS 00 MOS//NOTHING FOLLOWS		12. RECORD OF SERVICE																																											
		<table border="1"> <thead> <tr> <th></th> <th>YEAR(S)</th> <th>MONTH(S)</th> <th>DAY(S)</th> </tr> </thead> <tbody> <tr> <td>a. DATE ENTERED AD THIS PERIOD</td> <td>2014</td> <td>01</td> <td>07</td> </tr> <tr> <td>b. SEPARATION DATE THIS PERIOD</td> <td>2014</td> <td>05</td> <td>10</td> </tr> <tr> <td>c. NET ACTIVE SERVICE THIS PERIOD</td> <td>0000</td> <td>04</td> <td>04</td> </tr> <tr> <td>d. TOTAL PRIOR ACTIVE SERVICE</td> <td>0000</td> <td>00</td> <td>00</td> </tr> <tr> <td>e. TOTAL PRIOR INACTIVE SERVICE</td> <td>0000</td> <td>02</td> <td>07</td> </tr> <tr> <td>f. FOREIGN SERVICE</td> <td>0000</td> <td>00</td> <td>00</td> </tr> <tr> <td>g. SEA SERVICE</td> <td>0000</td> <td>00</td> <td>00</td> </tr> <tr> <td>h. INITIAL ENTRY TRAINING</td> <td>0000</td> <td>04</td> <td>04</td> </tr> <tr> <td>i. EFFECTIVE DATE OF PAY GRADE</td> <td>2013</td> <td>10</td> <td>30</td> </tr> </tbody> </table>					YEAR(S)	MONTH(S)	DAY(S)	a. DATE ENTERED AD THIS PERIOD	2014	01	07	b. SEPARATION DATE THIS PERIOD	2014	05	10	c. NET ACTIVE SERVICE THIS PERIOD	0000	04	04	d. TOTAL PRIOR ACTIVE SERVICE	0000	00	00	e. TOTAL PRIOR INACTIVE SERVICE	0000	02	07	f. FOREIGN SERVICE	0000	00	00	g. SEA SERVICE	0000	00	00	h. INITIAL ENTRY TRAINING	0000	04	04	i. EFFECTIVE DATE OF PAY GRADE	2013	10	30
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13. DECORATIONS, MEDALS, BADGES, CITATIONS AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED (All periods of service) NATIONAL DEFENSE SERVICE MEDAL//ARMY SERVICE RIBBON//NOTHING FOLLOWS		14. MILITARY EDUCATION (Course title, number of weeks, and month and year completed) NONE//NOTHING FOLLOWS																																											
15a. COMMISSIONED THROUGH SERVICE ACADEMY YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>																																													
b. COMMISSIONED THROUGH ROTC SCHOLARSHIP (10 USC Sec. 2107b) YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>																																													
c. ENLISTED UNDER LOAN REPAYMENT PROGRAM (10 USC Chap. 109) (If Yes, years of commitment: NA) YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>																																													
16. DAYS ACCRUED LEAVE PAID 0		17. MEMBER WAS PROVIDED COMPLETE DENTAL EXAMINATION AND ALL APPROPRIATE DENTAL SERVICES AND TREATMENT WITHIN 90 DAYS PRIOR TO SEPARATION YES <input type="checkbox"/> NO <input checked="" type="checkbox"/>																																											
18. REMARKS BLOCK 25: ORDERS NUMBER 4007015, 20131106//MEMBER HAS COMPLETED FIRST FULL TERM OF SERVICE//NOTHING FOLLOWS																																													
The information contained herein is subject to computer matching within the Department of Defense or with any other affected Federal or non-Federal agency for verification purposes and to determine eligibility for, and/or continued compliance with, the requirements of a Federal benefit program.																																													
19a. MAILING ADDRESS AFTER SEPARATION (Include ZIP Code) [REDACTED]		b. NEAREST RELATIVE (Name and address - include ZIP Code) [REDACTED]																																											
20. MEMBER REQUESTS COPY 6 BE SENT TO (Specify state/locality) MA OFFICE OF VETERANS AFFAIRS <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/>																																													
a. MEMBER REQUESTS COPY 3 BE SENT TO THE CENTRAL OFFICE OF THE DEPARTMENT OF VETERANS AFFAIRS (WASHINGTON, DC) <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO <input type="checkbox"/>																																													
21a. MEMBER SIGNATURE DESIGNED BY: [REDACTED]		b. DATE (YYYYMMDD) 20140507	22a. OFFICIAL AUTHORIZED TO SIGN (Typed name, grade, title, signature) DESIGNED BY: SMITH, PAULLA B. 1104970067 PAULLA B SMITH, GS11, SUPERVISOR		b. DATE (YYYYMMDD) 20140331																																								

SPECIAL ADDITIONAL INFORMATION (For use by authorized agencies only)

23. TYPE OF SEPARATION RELEASE FROM ACTIVE DUTY TRAINING		24. CHARACTER OF SERVICE (Include upgrades) HONORABLE	
25. SEPARATION AUTHORITY AR 635-200, CHAP 4		26. SEPARATION CODE MBK	27. REENTRY CODE 1
28. NARRATIVE REASON FOR SEPARATION COMPLETION OF REQUIRED ACTIVE SERVICE			
29. DATES OF TIME LOST DURING THIS PERIOD (YYYYMMDD) NONE		30. MEMBER REQUESTS COPY 4 (Initials) RAH	

DD FORM 214, AUG 2009

PREVIOUS EDITION IS OBSOLETE.
GENERATED BY TRANSPROC

MEMBER 4

SLIDE 33: NOT A VETERAN – NO 90-DAY DISABILITY (FORM B)

THIS IS AN IMPORTANT RECORD
SAFEGUARD IT.

PERSONAL DATA	1. LAST NAME - FIRST NAME - MIDDLE NAME [REDACTED]				2. SERVICE No. [REDACTED]		3. SOCIAL SECURITY NUMBER [REDACTED]		
	4. DEPARTMENT, COMPONENT AND BRANCH OR CLASS ARMY AUS UNASGN				5a. GRADE, RATE OR RANK PVT (P)		b. PAY GRADE E-1		6. DATE OF RANK DAY MONTH YEAR 24 Feb 67
SELECTIVE SERVICE DATA	7. U. S. CITIZEN <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		8. PLACE OF BIRTH (City and State or Country) Clinton, Massachusetts				9. DATE OF BIRTH DAY MONTH YEAR [REDACTED]		
	10a. SELECTIVE SERVICE NUMBER 19 162 47 417		b. SELECTIVE SERVICE LOCAL BOARD NUMBER, CITY, COUNTY, STATE AND ZIP CODE LB # 162 Clinton, Massachusetts				c. DATE INDUCTED DAY MONTH YEAR 24 Feb 67		
TRANSFER OR DISCHARGE DATA	11a. TYPE OF TRANSFER OR DISCHARGE DISCHARGE				b. STATION OR INSTALLATION AT WHICH EFFECTED Fort Bragg, North Carolina				
	c. REASON AND AUTHORITY Chap 5 Sec III AR 635-200 SPN 375 (Physical Disability)				d. EFFECTIVE DATE DAY MONTH YEAR 17 Apr 67				
	12. LAST DUTY ASSIGNMENT AND MAJOR COMMAND Co A 3rd Bn 1st Bde USATC TUSA				13a. CHARACTER OF SERVICE HONORABLE		b. TYPE OF CERTIFICATE ISSUED DD Form 256 A		
	14. DISTRICT, AREA COMMAND OR CORPS TO WHICH RESERVIST TRANSFERRED NA				15. REENLISTMENT CODE RE-4				
SERVICE DATA	16. TERMINAL DATE OF RESERVE UNIT'S OBLIGATION DAY MONTH YEAR NA			17. CURRENT ACTIVE SERVICE OTHER THAN BY INDUCTION a. SOURCE OF ENTRY: <input type="checkbox"/> ENLISTED (First Enlistment) <input type="checkbox"/> ENLISTED (Prior Service) <input type="checkbox"/> REENLISTED OTHER NA			b. TERM OF SERVICE (Years) NA		c. DATE OF ENTRY DAY MONTH YEAR NA
	18. PRIOR REGULAR ENLISTMENTS None			19. GRADE, RATE OR RANK AT TIME OF ENTRY INTO CURRENT ACTIVE SVC Private E-1			20. PLACE OF ENTRY INTO CURRENT ACTIVE SERVICE (City and State) Boston, Massachusetts		
	21. HOME OF RECORD AT TIME OF ENTRY INTO ACTIVE SERVICE (Street, RFD, City, County, State and ZIP Code) [REDACTED]			22. STATEMENT OF SERVICE			YEARS MONTHS DAYS		
	23a. SPECIALTY NUMBER & TITLE 09B00 Trainee			b. RELATED CIVILIAN OCCUPATION AND D.O.T. NUMBER NA			a. CREDITABLE FOR BASIC PAY PURPOSES		
							(1) NET SERVICE THIS PERIOD 0 1 24		
				(2) OTHER SERVICE 0 0 0					
				(3) TOTAL (Line (1) plus Line (2)) 0 1 24					
				b. TOTAL ACTIVE SERVICE 0 1 24					
				c. FOREIGN AND OR SEA SERVICE 0 0 0					
	24. DECORATIONS, MEDALS, BADGES, COMMENDATIONS, CITATIONS AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED None								
25. EDUCATION AND TRAINING COMPLETED None									
VA AND EMP. SERVICE DATA	26a. NON-PAY PERIODS TIME LOST (Preceding Two Years) None			b. DAYS ACCRUED LEAVE PAID 5		27a. INSURANCE IN FORCE (NSLI or USGLI) <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO		b. AMOUNT OF ALLOTMENT NA	
				28. VA CLAIM NUMBER C. NA		29. SERVICEMEN'S GROUP LIFE INSURANCE COVERAGE <input checked="" type="checkbox"/> \$10,000 <input type="checkbox"/> \$5,000 <input type="checkbox"/> NONE			
REMARKS	30. REMARKS High School (4 Yrs) General BLOOD GROUP: 0 KPTS: Severance Pay Not Authorized Par 10 AR 601-210 Applies								
AUTHENTICATION	31. PERMANENT ADDRESS FOR MAILING PURPOSES AFTER TRANSFER OR DISCHARGE (Street, RFD, City, County, State and ZIP Code) I-21					32. SIGNATURE OF PERSON BEING TRANSFERRED OR DISCHARGED [REDACTED]			
	33. TYPED NAME, GRADE AND TITLE OF AUTHORIZING OFFICER SHARON A WELLS 1LT WAC ACT ASST AG					34. SIGNATURE OF OFFICER AUTHORIZED TO SIGN <i>Sharon A. Wells</i>			

DD FORM 214
JUL 66

PREVIOUS EDITIONS OF THIS FORM
ARE OBSOLETE EFFECTIVE 1 JAN 67.

GPO : 1966 O - 233-125

ARMED FORCES OF THE UNITED STATES
REPORT OF TRANSFER OR DISCHARGE

2

SLIDE 34: VETERAN – MAXIMUM OF 4 YEARS (FORM C)

CAUTION: NOT TO BE USED FOR IDENTIFICATION PURPOSES

THIS IS AN IMPORTANT RECORD. SAFEGUARD IT.

ANY ALTERATIONS IN SHADED AREAS RENDER FORM VOID

CERTIFICATE OF RELEASE OR DISCHARGE FROM ACTIVE DUTY				
This Report Contains Information Subject to the Privacy Act of 1974, As Amended.				
1. NAME (Last, First, Middle) [REDACTED]		2. DEPARTMENT, COMPONENT AND BRANCH AIR FORCE-REGAF		3. SOCIAL SECURITY NUMBER [REDACTED]
4a. GRADE, RATE OR RANK SRA	b. PAY GRADE E4	5. DATE OF BIRTH (YYYYMMDD) [REDACTED]	6. RESERVE OBLIGATION TERMINATION DATE (YYYYMMDD) 20180330	
7a. PLACE OF ENTRY INTO ACTIVE DUTY EL SEGUNDO CA		b. HOME OF RECORD AT TIME OF ENTRY (City and state, or complete address if known) SIMI VALLEY (VENTURA) CA		
8a. LAST DUTY ASSIGNMENT AND MAJOR COMMAND 80 SURGICAL OPS SQ (AMC)		b. STATION WHERE SEPARATED JBSA RANDOLPH TX		
9. COMMAND TO WHICH TRANSFERRED USAFR			10. SGLI COVERAGE <input type="checkbox"/> NONE AMOUNT: \$400,000	
11. PRIMARY SPECIALTY (List number, title and years and months in specialty. List additional specialty numbers and titles involving periods of one or more years.) 4N031, AEROSPACE MEDICAL SERVICE, 3 YEARS AND 10 MONTHS.		12. RECORD OF SERVICE		
		a. DATE ENTERED AD THIS PERIOD		
		b. SEPARATION DATE THIS PERIOD		
		c. NET ACTIVE SERVICE THIS PERIOD		
		d. TOTAL PRIOR ACTIVE SERVICE		
		e. TOTAL PRIOR INACTIVE SERVICE		
		f. FOREIGN SERVICE		
		g. SEA SERVICE		
		h. INITIAL ENTRY TRAINING		
		i. EFFECTIVE DATE OF PAY GRADE		
13. DECORATIONS, MEDALS, BADGES, CITATIONS AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED (All periods of service) AF Outstanding Unit Award with 2 Oak Leaf Clusters, AF Good Conduct Medal, National Defense Service Medal, Global War on Terrorism Service Medal, AF Longevity Service, AF Training Ribbon.		14. MILITARY EDUCATION (Course title, number of weeks, and month and year completed) AF BASIC MILITARY TRG, APR 2011; (IHL) AEROSPACE MEDICAL SERVICE APPRENTICE - PHASE I, AUG 2011; (X4I) AEROSPACE MEDICAL SERVICE APPRENTICE - PHASE II, SEP 2011; (OMF) EXPEDITIONARY MEDICAL SUPPORT- HEALTH RESPONSE TEAM (EMEDS-HRT), OCT 2013; (9AA) AIR FORCE TRAINING COURSE, FEB 2014.		
15a. COMMISSIONED THROUGH SERVICE ACADEMY		YES	X	NO
b. COMMISSIONED THROUGH ROTC SCHOLARSHIP (10 USC Sec. 2107b)		YES	X	NO
c. ENLISTED UNDER LOAN REPAYMENT PROGRAM (10 USC Chap. 109) (If yes, years of commitment: _____)		YES	X	NO
16. DAYS ACCRUED LEAVE PAID 0	17. MEMBER WAS PROVIDED COMPLETE DENTAL EXAMINATION AND ALL APPROPRIATE DENTAL SERVICES AND TREATMENT WITHIN 90 DAYS PRIOR TO SEPARATION			YES NO X
18. REMARKS Member has completed first full term of service. Subject to recall to active duty and/or annual screening. Copy 3 to DVA Data Processing Center, Austin TX 78772 and copy 5 to Lockheed Martin Information Technology, U.S. Department of Labor, Federal Claims Control Center, P.O. Box 785070, Orlando, FL 32878-5070. -----NOTHING FOLLOWS-----				
The information contained herein is subject to computer matching within the Department of Defense or with any other affected Federal or non-Federal agency for verification purposes and to determine eligibility for, and/or continued compliance with, the requirements of a Federal benefit program.				
19a. MAILING ADDRESS AFTER SEPARATION (Include ZIP Code) [REDACTED]		b. NEAREST RELATIVE (Name and address - include ZIP Code) [REDACTED]		
20. MEMBER REQUESTS COPY 6 BE SENT TO (Specify state/locality) CA OFFICE OF VETERANS AFFAIRS		X	YES	NO
a. MEMBER REQUESTS COPY 3 BE SENT TO THE CENTRAL OFFICE OF THE DEPARTMENT OF VETERANS AFFAIRS (WASHINGTON, DC)		X	YES	NO
21a. MEMBER SIGNATURE MEMBER NOT AVAILABLE TO SIGN	b. DATE (YYYYMMDD) N/A	22a. OFFICIAL AUTHORIZED TO SIGN (Typed name, grade, title, signature) CAC/PIK1 SIGNED BY KIDD, MICHELE LYNN. 1386871732 CONTRACTOR, USAF, TFSC DD Form 214 Technician Feb 12 2015 7:47:08:000 PM CAC Serial Number: 099206 IssuerCN: DOD CA-31		b. DATE (YYYYMMDD) 20150212
SPECIAL ADDITIONAL INFORMATION (For use by authorized agencies only)				
23. TYPE OF SEPARATION RELEASE FROM ACTIVE DUTY		24. CHARACTER OF SERVICE (Include upgrades) HONORABLE		
25. SEPARATION AUTHORITY AFI 36-3208		26. SEPARATION CODE MBK	27. REENTRY CODE 1J	
28. NARRATIVE REASON FOR SEPARATION COMPLETION OF REQUIRED ACTIVE SERVICE				
29. DATES OF TIME LOST DURING THIS PERIOD (YYYYMMDD) NONE			30. MEMBER REQUESTS COPY 4 (Initials) N/A	

DD FORM 214, AUG 2009

PREVIOUS EDITION IS OBSOLETE

SERVICE-2

SLIDE 35: VETERAN – OLD DD-214 (FORM D)

THIS IS AN IMPORTANT RECORD
SAFEGUARD IT.

PERSONAL DATA	1. LAST NAME-FIRST NAME-MIDDLE NAME [REDACTED]		2. SERVICE NUMBER NA		3. SOCIAL SECURITY NUMBER [REDACTED]		
	4. DEPARTMENT, COMPONENT AND BRANCH OR CLASS ARMY-RA-OD		5a. GRADE, RATE OR RANK PFC	b. PAY GRADE E-3	6. DATE OF RANK DAY MONTH YEAR 10 MAY 1972		
	7. U.S. CITIZEN <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	8. PLACE OF BIRTH (City and State or Country) GLOUCESTER MASS		9. DATE OF BIRTH DAY MONTH YEAR [REDACTED]			
SERVICE DATA	10a. SELECTIVE SERVICE NUMBER NA		b. SELECTIVE SERVICE LOCAL BOARD NUMBER CITY, COUNTY STATE AND ZIP CODE LB # NA		c. DATE INDUCTED DAY MONTH YEAR NA		
	11a. TYPE OF TRANSFER OR DISCHARGE DISCHARGED		b. STATION OR INSTALLATION AT WHICH EFFECTED FORT DIX NEW JERSEY				
TRANSFER OR DISCHARGE DATA	c. REASON AND AUTHORITY AR 635-212 SPN 46A		d. EFFECTIVE DATE DAY MONTH YEAR 16 NOV 1972				
	12. LAST DUTY ASSIGNMENT AND MAJOR COMMAND CO C 3/33 ARMOR USAREUR		13a. CHARACTER OF SERVICE UNDER HONORABLE COND		b. TYPE OF CERTIFICATE ISSUED DD FORM 257A		
	14. DISTRICT AREA COMMAND OR CORPS TO WHICH RESERVIST TRANSFERRED NA		15. REENLISTMENT CODE RE-3				
SERVICE DATA	16. TERMINAL DATE OF RESERVE/UMTS OBLIGATION DAY MONTH YEAR NA		17. CURRENT ACTIVE SERVICE OTHER THAN BY INDUCTION a. SOURCE OF ENTRY <input checked="" type="checkbox"/> ENLISTED (First Enlistment) <input type="checkbox"/> ENLISTED (Prior Service) <input type="checkbox"/> REENLISTED <input type="checkbox"/> OTHER		b. TERM OF SERVICE (Years) 3	c. DATE OF ENTRY DAY MONTH YEAR 19 AUG 1971	
	18. PRIOR REGULAR ENLISTMENTS NONE		19. GRADE, RATE OR RANK AT TIME OF ENTRY INTO CURRENT ACTIVE SVC PV1		20. PLACE OF ENTRY INTO CURRENT ACTIVE SERVICE (City and State) BOSTON MASS		
	21. HOME OF RECORD AT TIME OF ENTRY INTO ACTIVE SERVICE (Street, RFD, City, County, State and ZIP Code) [REDACTED]		22. STATEMENT OF SERVICE		YEARS	MONTHS	DAYS
	23a. SPECIALTY NUMBER & TITLE 63F20 12DEC71 SEE 30		b. RELATED CIVILIAN OCCUPATION AND D.O.T. NUMBER 919.883 TOW TRK OPER				
			a. CREDITABLE FOR BASIC PAY PURPOSES		(1) NET SERVICE THIS PERIOD	1	2 28
					(2) OTHER SERVICE	0	0 0
					(3) TOTAL (Line (1) plus Line (2))	1	2 28
			b. TOTAL ACTIVE SERVICE		1	2 28	
			c. FOREIGN AND/OR SEA SERVICE		0	10 1	
			24. DECORATIONS, MEDALS, BADGES, COMMENDATIONS, CITATIONS AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED NATIONAL DEFENSE SERVICE MEDAL				
VA AND EMP. SERVICE DATA	26a. NON-PAY PERIODS TIME LOST (Preceding Two Years) NONE		b. DAYS ACCRUED LEAVE PAID NONE		27a. INSURANCE IN FORCE (NSLI or USGLI) <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO		b. AMOUNT OF ALLOTMENT NA
	28. VA CLAIM NUMBER c. NA		29. SERVICEMEN'S GROUP LIFE INSURANCE COVERAGE <input checked="" type="checkbox"/> \$15,000 <input type="checkbox"/> \$10,000 <input type="checkbox"/> \$5,000 <input type="checkbox"/> NONE				
			c. MONTH ALLOTMENT DISCONTINUED NA				
REMARKS	30. REMARKS CIV ED:7 YRS BLOOD GP:A POS ITEM 23A REC&EVAC SP ES NONE ITEM 22C USAREUR TABLE 2-5 AR 601-210 APPLIES						
AUTHENTICATION	31. PERMANENT ADDRESS FOR MAILING PURPOSES AFTER TRANSFER OR DISCHARGE (Street, RFD, City, County, State and ZIP Code) [REDACTED]		32. SIGNATURE OF PERSON BEING TRANSFERRED OR DISCHARGED [REDACTED]				
	33. TYPED NAME GRADE AND TITLE OF AUTHORIZING OFFICER LARRY D WILLIAMS 2LT AG CHIEF ENL BRANCH		34. SIGNATURE OF OFFICER AUTHORIZED TO SIGN Larry D Williams				

D 1 FORM 214
JUL 70

PREVIOUS EDITION OF THIS FORM IS TO BE USED.

ARMED FORCES OF THE UNITED STATES
REPORT OF TRANSFER OR DISCHARGE

1

SLIDE 36: NATIONAL GUARD BUREAU (FORM 22)

DEPARTMENTS OF THE ARMY AND THE AIR FORCE NATIONAL GUARD BUREAU										
REPORT OF SEPARATION AND RECORD OF SERVICE IN THE <u>ARMY</u> NATIONAL GUARD OF <u>MASS</u>					AND AS A RESERVE OF THE <u>ARMY</u>					
TYPE OF DISCHARGE <u>Honorable</u>					(No erasures or alterations in this entry valid)					
1. NAME (Last, first, middle initial)			2. SERVICE NO		3. GRADE		4. ARM OR SERVICE		5. TERM OF ENLISTMENT	
					SP5		Mass ARNG		6 yrs	
6. ORGANIZATION <u>Go F (HM) 726th Maint Bn</u>			7. DATE OF DISCHARGE			8. PLACE OF DISCHARGE				
<u>HOME STATION Barnum Rd Ft Devens MA</u>			<u>29 Aug 73</u>			<u>NG Armory Ft Devens MA 01433</u>				
9. PERMANENT ADDRESS FOR MAILING PURPOSES			10. DATE OF BIRTH			11. PLACE OF BIRTH				
12. CIVILIAN OCCUPATION (Include name and address of present employer, or if unemployed, the last employer)										
<u>Fire Fighter Revere Fire Department</u>										
13. RACE					14. MARITAL STATUS			15. U.S. CITIZEN		
WHITE <input checked="" type="checkbox"/> NEGRO <input type="checkbox"/> OTHER (Specify) <input type="checkbox"/>					SINGLE <input type="checkbox"/> MARRIED <input checked="" type="checkbox"/> OTHER (Specify) <input type="checkbox"/>			YES <input checked="" type="checkbox"/> NO <input type="checkbox"/>		
16. COLOR EYES		17. COLOR HAIR		18. HEIGHT		19. WEIGHT		20. NO DEPENDENTS		
<u>Brown</u>		<u>Brown</u>		<u>5 FT 11 IN</u>		<u>150 LBS</u>		<u>1</u>		
MILITARY HISTORY										
21. DATE AND PLACE OF ENLISTMENT						22. MILITARY OCCUPATIONAL SPECIALTY AND NUMBER				
<u>30 August 1967</u> <u>Dorchester MA</u>						<u>Small Arms Repairman 45B20</u>				
23. MILITARY QUALIFICATION AND DATE (i.e. Infantry, Aviation, Marksmanship Badge, etc)										
<u>Sharpshooters badge M16</u>										
24. DECORATIONS, CITATIONS, MEDALS, BADGES, COMMENDATIONS, AND CAMPAIGN RIBBONS AWARDED OR AUTHORIZED (This period of service)										
<u>None</u>										
25. PRIOR SERVICE (Branch of service, inclusive dates, and primary duty with ARS)										
<u>None</u>										
26. LENGTH THIS SERVICE			27. TOTAL SERVICE FOR PAY PURPOSES			28. EDUCATION (Years)			29. HIGHEST GRADE HELD	
YEARS	MONTHS	DAYS	YEARS	MONTHS	DAYS	GRAMMAR	HIGH SCHOOL	COLLEGE		
<u>6</u>	<u>0</u>	<u>0</u>	<u>6</u>	<u>0</u>	<u>0</u>	<u>8</u>	<u>4</u>	<u>0</u>	<u>SP5</u>	
30. SERVICE SCHOOLS ATTENDED AND DATES										
<u>None</u>										
31. REASON AND AUTHORITY FOR DISCHARGE										
<u>HD ETS SO # 67 Hq 726th Maint Bn</u>										
32. REMARKS (This space for completion of above items or entry of other items specified in NG directive)										
<u>NGB FORM 22 and Ngb form 55 Mailed to EM</u> <u>ACDUTRA REP 26 Feb 68 thru 3 Aug 68</u> <u>DD form 44 mailed to selective service board</u>										
33. SIGNATURE OF PERSON BEING DISCHARGED (Full name)						34. SIGNATURE OF OFFICER AUTHORIZED TO SIGN (Type name, grade, and organization)				
<u>KN unavailable for signature</u>						<u>LAWRENCE J WESLOWSKI</u> <u>CPT Ord C Mass ARNG</u>				

NGB FORM 22
 15 JAN 58 22

1. Insert either Army or Air
 2. Insert either Army or Air Force

REPLACES NGB FORM 22 DATED 15 NOV 49, WHICH IS OBSOLETE
 ★ GPO : 1956 O-450869

SLIDE 37: OTHER NATIONAL GUARD FORMS

CHRONOLOGICAL STATEMENT OF RETIREMENT POINTS										DATE	
For use of this form, see AR 135-180; the proponent agency is DCS, G-1										25OCT2017	
DATA REQUIRED BY THE PRIVACY ACT OF 1974											
AUTHORITY:		AR 135-180.									
PRINCIPAL PURPOSE:		To provide members of the Reserve Components a detailed listing of retirement points earned in the previous completed anniversary years. To assist units and Soldiers in verifying retirement points earned during the annual review. The purpose of soliciting the DOB is for positive identification. Identify the individual and his/her service record. Determine creditable service for retirement and other benefits.									
ROUTINE USE(S):		The DoD Blanket Routine Uses may apply to this collection.									
DISCLOSURE:		Voluntary. However, failure to furnish information may result in denial of retirement.									
NAME		ADDRESS				DOB		CURRENT GRADE		PEBD	
								SFC			
BEGINNING DATE YR MO DAY (1)	ENDING DATE YR MO DAY (2)	MILITARY PERSONNEL CLASS (3)	STATUS OR COMPONENT (4)	INACTIVE DUTY POINTS (5)	EXTENSION COURSE POINTS (6)	MEMBER-SHIP POINTS (7)	ACTIVE DUTY POINTS (8)	QUALIFYING FOR RETIREMENT YRS MO DAYS (9)			TOTAL POINTS CREDITABLE (10)
20100624	20100624	ENL	RET	000	000	00	0000	00	00	00	0000
20091017	20100623	ENL	USAR	018	000	10	0000	00	00	00	0028
20081017	20091016	ENL	USAR	045	011	15	0017	01	00	00	0088
20071017	20081016	ENL	USAR	044	005	15	0033	01	00	00	0097
20061017	20071016	ENL	USAR	045	004	15	0020	01	00	00	0084
20051017	20061016	ENL	USAR	052	009	15	0014	01	00	00	0090
20041017	20051016	ENL	USAR	013	014	15	0137	01	00	00	0179
20031017	20041016	ENL	USAR	026	000	15	0314	01	00	00	0355
20021017	20031016	ENL	USAR	048	000	15	0012	01	00	00	0075
20011017	20021016	ENL	USAR	048	004	15	0012	01	00	00	0079
20001017	20011016	ENL	USAR	034	006	15	0014	01	00	00	0069
19991017	20001016	ENL	USAR	000	000	15	0000	00	00	00	0015
19981017	19991016	ENL	USAR	001	005	15	0000	00	00	00	0021
19971017	19981016	ENL	USAR	030	003	15	0015	01	00	00	0063
19961017	19971016	ENL	USAR	016	015	15	0021	01	00	00	0067
19960521	19961016	ENL	BREAK	000	000	00	0000	00	00	00	0000
19960520	19960520	ENL	USAR	000	013	00	0000	00	00	01	0013
19950520	19960519	ENL	USAR	031	038	15	0014	01	00	00	0074
19940520	19950519	ENL	USAR	036	000	15	0014	01	00	00	0065
19930520	19940519	ENL	USAR	043	000	15	0013	01	00	00	0071
19920520	19930519	ENL	USAR	043	000	15	0031	01	00	00	0089
19910520	19920519	ENL	USAR	049	000	15	0017	01	00	00	0077
19900520	19910519	ENL	USAR	048	000	15	0016	01	00	00	0076
19890520	19900519	ENL	USAR	048	000	15	0012	01	00	00	0072
19880520	19890519	ENL	USAR	053	000	15	0017	01	00	00	0077
19870520	19880519	ENL	USAR	010	000	15	0170	01	00	00	0195
NOTHING FOLLOWS											
TOTAL				781	127	340	913	20	00	01	2119

DA FORM 5016, OCT 2015

PREVIOUS EDITION IS OBSOLETE

APD LC v1.00
Page 1 of 3

Active Duty Plus National Guard

- ❖ National Guard purchase at a 5-to-1 ratio

$$\frac{5 \text{ Years National Guard Time}}{1 \text{ year of c. 32 Service}} = \frac{\text{Actual National Guard Time}}{x \text{ years of c. 32 Service}}$$

$$x \text{ Years of c. 32 Service} = \frac{\text{Actual National Guard Time}}{5 \text{ Years National Guard Time}}$$

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Veteran's Legislation 2023-24 Session

- ❖ S. 1750 and H. 2627 An Act Relative to Veteran's Buyback
 - Removes the 180-day requirement
 - Requires Boards to notify members of potential veteran benefits
 - Allows for the buyback up to 1 year after vesting in the system
 - Anyone previously denied buyback because of 180-day rule will have 1 year from effective date of legislation to make the veteran buyback.

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NOTES:

Recent Cases of Note

- ❖ *Matthew Rodwill v. Worcester Regional Retirement System*, CR-21-0595 DALA (March 24, 2023).
- ❖ *Neal Gouck v. State Board of Retirement*, CR-19-0311 DALA (March 3, 2023). (On appeal to CRAB)
- ❖ Question in each case is when does the 180-day notice period begin.

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Things To Remember

- ❖ Veteran is defined by Massachusetts law not Federal law.
- ❖ Make sure member was honorably discharged.
- ❖ Wartime service not necessary if member has at least 180 days of active duty.
- ❖ Must have DD-214's and/or NGB-22 forms to calculate purchasable time.

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NOTES:

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

NOTES:

COMMONWEALTH OF MASSACHUSETTS

Public Employee Retirement Administration Commission

Five Middlesex Avenue, Suite 304 | Somerville, MA 02145

Phone: 617-666-4446 | Fax: 617-628-4002

TTY: 617-591-8917 | Web: www.mass.gov/perac

