

ALARACT 081/2024

DTG: R 251405Z SEP 24

UNCLAS

SUBJ/ALARACT 081/2024 – NOTIFICATION OF EXPIRATION – EXTENSION TO IMPLEMENTATION FOR EXCEPTION TO POLICY TO RETROACTIVELY ENROLL CERTAIN ELIGIBLE SOLDIERS IN THE BLENDED RETIREMENT SYSTEM AND HARDSHIP EXTENSION OF THE ENROLLMENT PERIOD

THIS ALARACT MESSAGE HAS BEEN TRANSMITTED BY JSP ON BEHALF OF HQDA, DCS, G-1, PLANS AND RESOURCES DIRECTORATE

1. (U) REFERENCES:

1.A. (U) OFFICE OF THE SECRETARY OF DEFENSE MEMORANDUM SUBJECT: IMPLEMENTATION OF THE BLENDED RETIREMENT SYSTEM, 27 JANUARY 2017 (AVAILABLE AT [HTTPS://MILITARYPAY.DEFENSE.GOV](https://militarypay.defense.gov))

1.B. (U) OFFICE OF THE UNDER SECRETARY OF DEFENSE MEMORANDUM SUBJECT: EXCEPTION TO POLICY GRANTING AUTHORITY TO RETROACTIVELY ENROLL CERTAIN ELIGIBLE MEMBERS IN THE BLENDED RETIREMENT SYSTEM, 22 JANUARY 2019 (SEE ATTACHMENT 1)

1.C. (U) ASSISTANT SECRETARY OF THE ARMY (MANPOWER AND RESERVE AFFAIRS) MEMORANDUM, SUBJECT: BLENDED RETIREMENT SYSTEM (BRS) ENROLLMENT PERIOD EXTENSION FOR NEWLY COMMISSIONED OFFICERS, 18 APRIL 2019 (SEE ATTACHMENT 2)

1.D. (U) OFFICE OF THE DEPUTY CHIEF OF STAFF, G-1 MEMORANDUM, SUBJECT: DELEGATION OF AUTHORITY: BLENDED RETIREMENT SYSTEM (BRS) ENROLLMENT PERIOD EXTENSION AND ENROLLMENT DATE ADJUSTMENT, 28 MAY 2019 (SEE ATTACHMENT 3)

1.E. (U) OFFICE OF THE DEPUTY CHIEF OF STAFF, G-1 MEMORANDUM, DELEGATION OF AUTHORITY: BLENDED RETIREMENT SYSTEM (BRS) ENROLLMENT PERIOD EXTENSION AND ENROLLMENT DATE ADJUSTMENT, 22 JUNE 2020 (SEE ATTACHMENT 4)

2. (U) PURPOSE: TO INFORM SOLDIERS AND COMMANDERS ABOUT THE EXCEPTION TO POLICY (ETP) FOR RETROACTIVE ENROLLMENT IN THE BRS.

3. (U) APPLICABILITY: THIS ALARACT APPLIES TO REGULAR ARMY SOLDIERS AND ARMY NATIONAL GUARD (ARNG)/ARNG UNITED STATES OR UNITED

STATES ARMY RESERVE (USAR) SOLDIERS SERVING ON ACTIVE DUTY OR TROOP PROGRAM UNIT/INDIVIDUAL READY RESERVE/INDIVIDUAL MOBILIZATION AUGMENTEE POSITIONS.

4. (U) PROCEDURES:

4.A. (U) EFFECTIVE 1 OCTOBER 2024, ALL REQUESTS FOR ETP FOR BRS ENROLLMENT WILL HAVE TO BE SUBMITTED TO THE ARMY REVIEW BOARD AGENCY TO CORRECT THE SOLDIER'S MILITARY RECORD TO REFLECT ENROLLMENT IN BRS.

4.B. (U) THE WEBSITE TO APPLY TO THE ARMY BOARD FOR CORRECTION OF MILITARY RECORDS IS [HTTPS://ARBA.ARMY.PENTAGON.MIL/ABCMR-APP.HTML](https://arba.army.pentagon.mil/abcmr-app.html).

4.C. (U) DOCUMENTS TO INCLUDE WITH THE APPLICATION:

4.C.1. (U) A PERSONNEL ACTION REQUEST (PAR) FROM THE INTEGRATED PERSONNEL AND PAY SYSTEM-ARMY (IPPS-A) SIGNED BY AN O-6 IN THE SOLDIER'S CHAIN-OF-COMMAND. A DA FORM 4187 (PERSONNEL ACTION), CAN BE SUBMITTED IN LIEU OF A PAR WHEN IPPS-A IS NOT AVAILABLE.

4.C.2. (U) BRS OPT-IN TRAINING CERTIFICATE.

5. (U) POINTS OF CONTACT:

5.A. (U) FOR GENERAL POLICY INQUIRIES, SUBMIT EMAIL INQUIRIES TO DEPUTY CHIEF OF STAFF, G-1, COMPENSATION AND ENTITLEMENTS DIVISION: USARMY.PENTAGON.HQDA-DCS-G-1.MBX.DAPE-PRC-SPECIAL-PAY@ARMY.MIL.

5.B. (U) ACTIVE COMPONENT SOLDIERS SUBMIT INQUIRIES TO THE HUMAN RESOURCES COMMAND: USARMY.KNOX.HRC.MBX.EMOD-FMO-RESERVE-SYSTEMS-REQUEST@ARMY.MIL.

5.C. (U) ARNG SOLDIERS SUBMIT INQUIRIES TO THE NATIONAL GUARD BUREAU: NG.NCR.NGB-ARNG.MBX.ARNG-COMP--ENTITLEMENT@ARMY.MIL.

5.D. (U) USAR SOLDIERS SUBMIT INQUIRES TO THE OFFICE OF THE CHIEF OF ARMY RESERVE: USARMY.USARC.OCAR.MBX.BRS@ARMY.MIL.

6. (U) THIS ALARACT MESSAGE EXPIRES ON 25 SEPTEMBER 2025.

ATTACHMENTS:

1. OFFICE OF THE UNDER SECRETARY OF DEFENSE MEMORANDUM SUBJECT: EXCEPTION TO POLICY GRANTING AUTHORITY TO RETROACTIVELY ENROLL CERTAIN ELIGIBLE MEMBERS IN THE BLENDED RETIREMENT SYSTEM

2. ASSISTANT SECRETARY OF THE ARMY (MANPOWER AND RESERVE AFFAIRS) MEMORANDUM, SUBJECT: BLENDED RETIREMENT SYSTEM (BRS) ENROLLMENT PERIOD EXTENSION FOR NEWLY COMMISSIONED OFFICERS

3. OFFICE OF THE DEPUTY CHIEF OF STAFF, G-1 MEMORANDUM, SUBJECT: DELEGATION OF AUTHORITY: BLENDED RETIREMENT SYSTEM (BRS) ENROLLMENT PERIOD EXTENSION AND ENROLLMENT DATE ADJUSTMENT

4. OFFICE OF THE DEPUTY CHIEF OF STAFF, G-1 MEMORANDUM, DELEGATION OF AUTHORITY: BLENDED RETIREMENT SYSTEM (BRS) ENROLLMENT PERIOD EXTENSION AND ENROLLMENT DATE ADJUSTMENT



OFFICE OF THE UNDER SECRETARY OF DEFENSE
4000 DEFENSE PENTAGON
WASHINGTON, D.C. 20301-4000

JAN 22 2019

MEMORANDUM FOR: SEE DISTRIBUTION

SUBJECT: Exception to Policy Granting Authority to Retroactively Enroll Certain Eligible Members in the Blended Retirement System

On January 27, 2017, the Deputy Secretary of Defense issued the memorandum, "Implementation of the Blended Retirement System," establishing policy and procedures for enrolling Service members in the Blended Retirement System (BRS). Specifically, paragraph 9.b.(4) of the memorandum mandates that members who are eligible to choose to enroll in BRS (i.e., "opt-in"), are required to complete mandatory BRS Opt-In Training prior to enrollment. Further, before effecting their enrollment in BRS, opt-in eligible members are required, by policy, to acknowledge that they are aware that their decision to enroll is irrevocable.

Pursuant to the "Implementation of Blended Retirement System" memorandum (hereafter referred to as the BRS policy memorandum), the Deputy Secretary of Defense delegated to the Under Secretary of Defense for Personnel and Readiness the authority to develop, publish, and maintain additional policy to implement aspects of BRS, as necessary, and to adjudicate exception to policy requests. This memorandum grants an exception to policy, in accordance with that delegated authority, that permits the Secretaries concerned of the Uniformed Services to grant certain exceptions to the opt-in enrollment policy for the reasons listed below. This memorandum does not change the eligibility criteria for BRS as established in the BRS policy memorandum, nor does it allow for the revocation of opt-in decisions by members who opted into BRS in accordance with prescribed procedures.

Since BRS became effective on January 1, 2018, certain members have not been afforded the opportunity to opt into BRS because of administrative errors regarding opt-in eligibility made by the Service-concerned rather than the individual member. These members must now be afforded the opportunity to enroll in BRS. Some members may be entitled to retroactive, government-provided Thrift Savings Plan (TSP) contributions.

Upon discovery of a BRS opt-in eligibility enrollment error, or discovery that a Service member was not notified of his or her eligibility to opt into BRS, the Uniformed Service member will be notified of his or her options. These options are to either enroll in BRS or remain in the legacy retirement system. The member will be:

- a. Placed under the correct retirement system.
- b. Afforded the opportunity to complete the mandatory BRS Opt-In Training course.

c. Granted an extension of the BRS opt-in enrollment period in accordance with paragraph 9.d.(2)(d) of the BRS policy memorandum, if required.

d. Informed of the procedures and/or granted access to the system necessary to make an opt-in decision while acknowledging the irrevocability of that decision.

Regardless of the circumstances of the error, a Uniformed Service member who was or should have been eligible to opt into BRS, based on the criteria specified in the BRS policy memorandum, may only be enrolled in BRS if he or she:

- a. Completes the mandatory BRS Opt-In Training course.
- b. Acknowledges the irrevocability of the opt-in decision.
- c. Opts-in via procedures specified in paragraph 9.b.(2) of the BRS policy memorandum.

After a member has enrolled in BRS, as stipulated above, the applicable Secretary concerned (as such term is defined in paragraph 4.f. of the BRS policy memorandum) is hereby delegated the authority to adjust such member's enrollment date to an earlier date than the actual date of training completion or date of acknowledgement of irrevocability. In these cases, the Secretary concerned may determine that a Uniformed Service member's date of enrollment may be adjusted to no earlier than the date the member would otherwise have first been eligible to opt into BRS.

This delegated authority to retroactively adjust the enrollment date of a member who has opted into BRS may only be applied in situations in which the Uniformed Service incorrectly identified the member's BRS opt-in eligibility or failed to notify the member of his or her eligibility to opt into BRS, resulting in financial loss to the Uniformed Service member. Situations in which the Secretary concerned may establish an earlier opt-in date include:

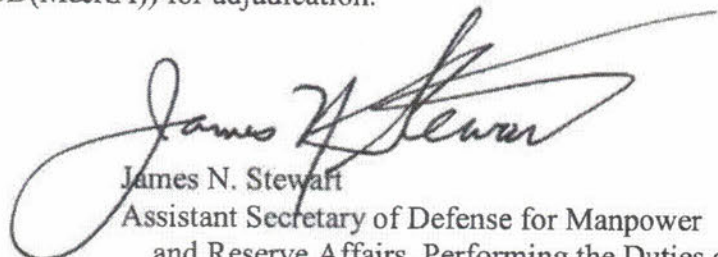
a. Missing or inaccurate Date of Initial Entry Into Military Service (DIEMS) information that was incorrectly applied upon entry to active duty or into an active status. This includes a member whose actual DIEMS was on or prior to December 31, 2017, and who otherwise should have been afforded the opportunity to opt into BRS, but whose DIEMS was incorrectly recorded as occurring on or after January 1, 2018, resulting in the member being automatically enrolled in BRS under the policies governing enrollment for new accessions.

b. Failure of a Uniformed Service to correctly identify a Service member as eligible on the eligibility batch files transmitted by the Service-concerned to the Defense Finance and Accounting Service (DFAS), or other appropriate pay agent, resulting in an otherwise eligible member being grandfathered under the legacy retirement system with no option to opt-in.

c. Failure of a Uniformed Service to adequately notify a Service member of his or her eligibility and opportunity to elect to enroll in BRS.

The Secretaries concerned will work directly with DFAS, or appropriate pay agent, to ensure that the correct date of enrollment is established and the necessary records are maintained with the Service member's pay file. The Secretary concerned will also work with DFAS, or appropriate pay agent, to ensure that the proper retroactive government automatic and matching TSP contributions, including any earnings or losses, are made to the member's TSP account. Retroactive matching TSP contributions will only be made in accordance with individual contributions previously made that should otherwise have been matched had the member been correctly enrolled in BRS. Retroactive individual TSP contributions are not permitted.

The authority to grant any additional exceptions to BRS enrollment policy, beyond those expressly granted in this memorandum, is further delegated to the Assistant Secretary of Defense for Manpower and Reserve Affairs (ASD(M&RA)) for adjudication.



James N. Stewart

Assistant Secretary of Defense for Manpower
and Reserve Affairs, Performing the Duties of
the Under Secretary of Defense for Personnel
and Readiness

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Director of Net Assessment
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Directors of the Defense Agencies
Directors of the DoD Field Activities

cc:

Executive Director, Federal Retirement Thrift Investment Board



DEPARTMENT OF THE ARMY
ASSISTANT SECRETARY OF THE ARMY
MANPOWER AND RESERVE AFFAIRS
111 ARMY PENTAGON
WASHINGTON DC 20310-0111

SAMR

MEMORANDUM FOR

DIRECTOR, DEFENSE FINANCE AND ACCOUNTING SERVICES, MILITARY PAY
OPERATIONS, 8899 EAST 56th STREET, INDIANAPOLIS, INDIANA 46249
COMMANDER, U.S. ARMY TRAINING AND DOCTRINE COMMAND,
950 JEFFERSON AVENUE, FORT EUSTIS, VA 23604-5700
DEPUTY CHIEF OF STAFF, G-1 (DAPE-ZA), 300 ARMY PENTAGON,
WASHINGTON, DC 20310-0300
SUPERINTENDENT, UNITED STATES MILITARY ACADEMY, WEST POINT,
NEW YORK 10996-5000

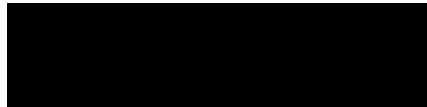
SUBJECT: Blended Retirement System (BRS) Enrollment Period Extension for Newly
Commissioned Officers

1. Reference memorandum, Deputy Secretary of Defense, 27 Jan 17, subject:
Implementation of Blended Retirement System.
2. Due to the administrative and technical requirement for establishing pay and email
accounts, I extend the BRS enrollment period for newly commissioned officers from 30
days after first day performing actual duty to 90 days after receiving a BRS opt-in
eligible notification via official government email account.
3. This policy applies to commissioned officers who meet the following criteria:
 - a. Was attending the United States Military Academy or enrolled in the Senior
Reserve Officer Training Corps as of 31 December 2017 with a signed agreement to
serve as a commissioned officer in the Army; and
 - b. Has a Date of Initial Entry Into Military Service on or before 31 December 2017;
and
 - c. Is in receipt of basic pay or inactive duty pay under Section 204 or 206,
respectively, of Title 37, U.S.C., on or after 31 December 2017; and
 - d. Has a commissioning date on or after 1 December 2018; and
 - e. Was not eligible to opt into the BRS during 2018.
4. This policy is effective immediately and expires on 30 April 2022.

SAMR

SUBJECT: Blended Retirement System (BRS) Enrollment Period Extension for Newly Commissioned Officers

5. My points of contact are Mr. Dalton Alleyne at (703) 692-7954 or dalton.r.alleyne.civ@mail.mil and MAJ Yunsong Han at (703) 697-1482 or yunsong.han.mil@mail.mil.



E. CASEY WARDYNSKI

CF:
Chief, Army Reserve
Director, Army National Guard



DEPARTMENT OF THE ARMY
OFFICE OF THE DEPUTY CHIEF OF STAFF, G-1
300 ARMY PENTAGON
WASHINGTON, DC 20310-0300

DAPE-PR

MAY 28 2019

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment

1. References:

- a. Memorandum, Office of the Deputy Chief of Staff, G-1, 22 May 19, subject, Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment.
- b. Memorandum, Assistant Secretary of the Army, Manpower and Reserve Affairs, 18 Apr 19, subject, Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment.
- c. Memorandum, Deputy Secretary of Defense, 27 Jan 17, subject: Implementation of Blended Retirement System.
- d. Memorandum, Office of the Under Secretary of Defense for Personnel and Readiness, 22 Jan 19, subject: Exception to Policy Granting Authority to Retroactively Enroll Certain Eligible members in the Blended Retirement System.
- e. Memorandum, Secretary of the Army, 30 Jan 18, subject: Delegation of Authority-Guidance for Implementation of Blended Retirement System for the Uniformed Services.

2. Reference 1.a delineates conditions under which the Director Plans & Resources can approve the extension of the time period for enrollment in the BRS:

- a. Deployment for 30 days or more that is inclusive of 31 Dec 18, which prevented the Soldier from having access to all resources available to make financial or retirement decisions.
- b. Court proceedings or court orders that prevented a Soldier from making financial or retirement decisions during the enrollment period.
- c. Illness or injury that substantially impacted a Soldier's ability to make financial or retirement decisions during the enrollment period.

d. Inability to complete the mandatory "Opt-In" training due to circumstances beyond the control of the Soldier.

e. Inability to access the MyPay website or follow the designated procedures for making the election during the enrollment period due to circumstances beyond the reasonable control of the Soldier.

f. Failure to notify a Soldier of his or her eligibility to elect to opt into the BRS at least 60 days prior to the conclusion of the enrollment period.

g. Other extraordinary or exceptional circumstances.

3. In addition to the authority to extend the enrollment window, reference 1.b authorizes the Secretary of the Army to retroactively adjust the enrollment date of a Soldier in situations in which the Army incorrectly identified the member's BRS opt-in eligibility and resulted in financial loss to the Soldier under following situations:

a. Missing or inaccurate Date of Initial Entry Into Military Service (DIEMS) information that was incorrectly applied upon entry to active duty or into an active status, and it resulted in a Soldier being automatically enrolled in BRS under the policies governing enrollment for new accessions.

b. Failure of the Army to correctly identify a BRS eligible Soldier to the Defense Finance and Accounting Services.

c. Failure of the Army to adequately notify a Soldier of his or her eligibility and opportunity to enroll in BRS.

4. I delegate the authority to approve waivers as follows. All delegations will be in writing.


a. Waiver authority for paragraph 2.a through 2.e is delegated to a G-1 or Deputy G-1 of a general officer level headquarters within a Soldier's chain of command. The G-1 or Deputy G-1 may not further delegate this authority.

b. Waiver authority for paragraph 2.f-g and 3.a through 3.c remains with the Director, Plans and Resources and may not be further delegated.

5. This delegation of authority is effective immediately and expires 1 year from the date of this memorandum.

SUBJECT: Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment

6. My points of contact are Larry Lock at (703) 692-7952 or larry.lock.civ@mail.mil and Mr. Dalton Alleyne at (703) 692-7954 or dalton.r.alleyne.civ@mail.mil



ROBERT L., STEINRAUF
Director, Plans and Resources
Directorate

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DEPARTMENT OF THE ARMY
OFFICE OF THE DEPUTY CHIEF OF STAFF, G-1
300 ARMY PENTAGON
WASHINGTON DC 20310-0300

DAPE-PR

22 June 2020

MEMORANDUM FOR SEE DISTRIBUTION

SUBJECT: Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment

1. Reference:

a. Memorandum, Office of the Deputy Chief of Staff, G-1, 28 May 19, subject, Delegation of Authority Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment.

b. Memorandum, Office of the Deputy Chief of Staff, G-1, 22 May 19, subject, Delegation of Authority Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment.

b. Memorandum, Assistant Secretary of the Army, Manpower and Reserve Affairs, 18 Apr 19, subject: Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment.

c. Memorandum, Deputy Secretary of Defense, 27 Jan 17, subject: Implementation of Blended Retirement System.

d. Memorandum, Office of the Under Secretary of Defense for Personnel and Readiness, 22 Jan 19, subject: Exception to Policy Granting Authority to Retroactively Enroll Certain Eligible Members in the Blended Retirement System.

e. Memorandum, Secretary of the Army, 30 Jan 18, subject: Delegation of Authority-Guidance for Implementation of Blended Retirement System for the Uniformed Services.

2. The authority contained in reference 1.a. is extended until 31 December 2020. This extension provides additional time for any Soldier that desires enrollment to BRS but was unable due to restrictions from the response to the COVID-19 outbreak.

3. Reference 1.b delineates conditions under which the Director Plans & Resources can approve the extension of the period for enrollment in the BRS:

a. Deployment for 30 days or more that is inclusive of 21 December 2018, which prevented the Soldier from having access to all resources available to make financial or retirement decisions.

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SUBJECT: Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment

b. Court proceedings or court orders that prevented a Soldier from making financial or retirement decisions during the enrollment period.

c. Illness or injury that substantially impacted a Soldier's ability to make financial or retirement decisions during the enrollment period.

d. Inability to complete the mandatory "Opt-in" training due to circumstances beyond the control of the Soldier.

e. Inability to access the MyPay website or follow the designated procedures for making the election during the enrollment period due to circumstances beyond the reasonable control of the Soldier.

f. Failure to notify a Soldier of his or her eligibility to elect to opt into the BRS at least 60 days prior to the conclusion of the enrollment period.

g. Other extraordinary or exceptional circumstances.

4. In addition to the authority to extend the enrollment window, reference 1.c. authorizes the Secretary of the Army to retroactively adjust the enrollment date of a Soldier in situations in which the Army incorrectly identified the member's BRS opt-in eligibility and resulted in financial loss to the Soldier under the following situations:

a. Missing or inaccurate date of initial entry into military service information that was incorrectly applied upon entry to active duty or into an active status, and it resulted in a Soldier being automatically enrolled in BRS under the policies governing enrollment for new accessions.

b. Failure of the Army to correctly identify a BRS eligible Soldier to the Defense Finance and Accounting Services.

c. Failure of the Army to adequately notify a Soldier of his or her eligibility and opportunity to enroll in BRS.

5. I delegate the authority to approve waivers as follows. All delegations will be in writing.

a. Waiver authority for paragraph 2.a through 2.e is delegated to a G-1 or Deputy G-1 of a general officer level headquarters within a Soldier's chain-of-command. The G-1 or Deputy G-1 may not further delegate this authority.

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SUBJECT: Delegation of Authority: Blended Retirement System (BRS) Enrollment Period Extension and Enrollment Date Adjustment

b. Waiver authority for paragraph 2.f through 2.g and 3.a through 3.c remains with the Director, Plans and Resources and may not be further delegated.

6. Points of contact regarding this extension is Larry Lock at (703) 692-7952 or larry.lock.civ@mail.mil and Mr. Jack Allen at (703) 692-5946 or jack.s.allen.civ@mail.mil.

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ROBERT L. STEINRAUF
Director, Plans and Resources
Directorate

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SUBJECT: Delegation of Authority: Blended Retirement System (BRS) Enrollment
Period Extension and Enrollment Date Adjustment

CF:

Director of Business Transformation
Commander, Eighth Army