



Department of Defense INSTRUCTION

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Incorporating Change 1, November 7, 2008

USD(P&R)

SUBJECT: Service Credit for Reserve Retirement

- References:
- (a) DoD Instruction 1215.7, "Service Credit for Reserve Retirement," March 1, 2001 (hereby canceled)
 - (b) ~~DoD Directive 1205.17, "Official National Guard and Reserve Component Personnel Data," April 30, 2004~~ DoD Instruction 7730.54, "Reserve Component Common Personnel Data Systems (RCCPDS)," March 31, 2008
 - (c) Chapters 15 and 1223, sections 101, 688, 502, 513, 2126(b), 10152, ~~and 12301, 12302, 12304, 12305, 12310, 12406,~~ 12503, and 12731 of title 10, United States Code
 - (d) DoD Directive 5124.02, "Under Secretary of Defense for Personnel and Readiness (USD(P&R)), " ~~October 31, 1994~~ June 23, 2008
 - (e) through (hf), see enclosure 1

1. REISSUANCE AND PURPOSE

This Instruction reissues reference (a) to update existing responsibilities and establish uniform procedures, consistent with the requirements of reference (b), for the crediting of Active and Reserve service for non-regular retirement under Chapter 1223 of reference (c).

2. APPLICABILITY

This Instruction applies to the Office of the Secretary of the Defense (OSD), the Military Departments (including the Coast Guard ~~when it is not operating as a Military Service in the Navy under agreement with the~~ at all times, including when it is a Service in the Department of Homeland Security *by agreement with that Department*), the Chairman of the Joint Chiefs of Staff *and the Joint Staff*, the Combatant Commands, the Office of Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, *and* all other organizational entities in the Department of Defense (hereafter referred to collectively as "the DoD Components"). The term "Military Services," as used herein, refers to the Army, the Navy, the Air Force, and the Marine Corps and includes their National Guard and Reserve components.

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"Secretary concerned" refers to the Secretaries of the Military Departments and the Secretary of Homeland Security.

3. DEFINITIONS

3.1. Equivalent Instruction. Those activities performed instead of or in addition to a regularly scheduled unit training assembly or drill. The subject matter of the equivalent instruction shall relate to the instruction for which it is or might be substituted, and shall be of definite military benefit to the individual.

3.2. Uniformed Services. The Army, Navy, Air Force, Marine Corps, Coast Guard, Commissioned Corps of the U.S. Public Health Service, and Commissioned Corps of the National Oceanic and Atmospheric Administration.

4. POLICY

It is DoD policy that uniform procedures be used to manage all Regular and Reserve duty of Service members for crediting and accounting of non-regular retirement.

5. RESPONSIBILITIES

5.1. The Under Secretary of Defense for Personnel and Readiness (USD(P&R)) shall:

5.1.1. Ensure that personnel data requirements for actuarial valuations of non-regular retirement are identified to the Assistant Secretary of Defense for Reserve Affairs.

5.1.2. Issue such policy guidance to, and exercise management supervision of, the Defense Manpower Data Center (DMDC), consistent with responsibilities identified in DoD Directive 5124.02 (reference (d)), to ensure DMDC is able to fulfill its responsibilities to support the Military Services' maintenance of uniform and accurate procedures for crediting service for non-regular retirement.

5.1.3. Ensure that the Director, DMDC, administers the collection, processing, and reporting of personnel data in support of the OSD and the Military Services according to DoD Instruction 7730.54 (reference (eb)).

5.2. The Assistant Secretary of Defense for Reserve Affairs, under the USD(P&R) shall establish:

5.2.1. Uniform Reserve components' training and retirement categories prescribed in DoD ~~Directive Instruction~~ 1215.06 (reference (f)) ~~and DoD Instruction 1215.19 (reference (g))~~.

5.2.2. Personnel transaction accounting, personnel data definitions, and data accuracy standards to support the policy established in DoD ~~Directive 1205.17~~ *Instruction 7730.54* (reference (b)).

5.3. The Secretaries of the Military Departments *and the Commandant of the U.S. Coast Guard* shall ensure the capability to operate and maintain Reserve personnel data systems consistent with Active component personnel data systems so these systems are compatible and efficiently integrated on mobilization of Reserve forces. These systems shall provide the capability to record and maintain the information necessary for the accurate, effective, and timely management of Service credit for non-regular retirement in accordance with DoD ~~Directive 1205.17~~ *Instruction 7730.54* (reference (b)) and this Instruction. This shall, as a minimum, include the capability to:

5.3.1. Obtain and maintain the information necessary to accurately credit Uniformed Service for non-regular retirement by all members under the jurisdiction of the Secretary concerned. This shall include the service date information specified in this Instruction and the active duty, inactive duty, and other duty or service for which retirement points may be credited. In addition, information shall be obtained and maintained to ensure timely and accurate issuance of the notice of fulfillment of the service requirements for eligibility for non-regular retired pay required by Section 12731(d) of title 10, United States Code (reference (c)).

5.3.2. Provide for the automated transfer of complete service data and service credit information between the components of their respective Services and, as required, to any other Service in the case of the inter-Service transfer of a member.

5.3.3. Provide data as required by the Chief, Office of the Actuary, Department of Defense, for the valuation of the costs of non-regular retirement and the computation of the normal cost contribution to be assessed against the pay of National Guard or Reserve personnel.

5.3.4. Ensure that the information required is available so retired pay for non-regular retirement can be accurately calculated in a timely manner on application by eligible individuals at the age specified in 10 U.S.C. 12731 (reference (c)).

6. PROCEDURES

6.1. Criteria for Establishing the Service Requirement for a Satisfactory Year of Service for Non-Regular Retirement.

6.1.1. Qualifying Years of Satisfactory Service. A qualifying year of service for non-regular retired pay is a full year, as described in paragraphs 6.1.2. and 6.1.3., during which a Regular or Reserve member is credited with a minimum of 50 retirement points. Except as otherwise provided by law, an accumulation of 20 such years is one requirement necessary to qualify for non-regular retired pay.

6.1.2. Establishment of an Anniversary Year.

6.1.2.1. The full-year periods used for the crediting of qualifying years for non-regular retirement shall be based on anniversary years as set out in this Instruction.

6.1.2.2. Except as noted in paragraph 6.1.4., below, these anniversary year periods are calculated from an anniversary date. The date to determine the anniversary year is established by the date the member entered into active service or into active status in a Reserve component.

6.1.3. Adjustment to Anniversary Years.

6.1.3.1. The start date (month and day) for each successive anniversary year will not be adjusted unless the member has a break-in-service. A break-in-service occurs only when a member transfers to an inactive status list, the inactive National Guard, a temporary disability retired list, the Retired Reserve, or is discharged to civilian life for longer than 24 hours. There will be no break-in-service if the member transfers directly to another Regular or Reserve component.

6.1.3.2. When a member with a break-in-service returns to an active Reserve status or to active service, the revised anniversary year start date shall be the date of return or reentry.

6.1.4. Exceptions to Calculating Anniversary Years.

6.1.4.1. In the case of officers with Reserve service as a cadet or midshipman at a Service Academy or in a Reserve Officers' Training Corps program, the date for the start of a member's initial anniversary year will be established by the date the member entered into active service or active status minus any service as a cadet or midshipman.

6.1.4.2. In the case of enlisted members of the Armed Forces (who served as a cadet or midshipman but who did not later receive or who do not hold a commission as an officer), service as a cadet or midshipman at a service academy shall be included and counted as active duty.

6.1.5. Credit for Partial Years of Service.

6.1.5.1. A member who has a break-in-service that occurs during an anniversary year shall be credited with a partial year of qualifying service for non-regular retirement.

6.1.5.2. When, as a result of a break-in-service, a partial year occurs, the Service member must meet the minimum retirement point requirements set out in this Instruction for the member's service to be credited as a partial year towards a qualifying year. A partial qualifying year is any period less than 12 full months in which the retirement points credited to a member, when computed proportionally, are equal to or greater than 50 points. Calculation of credit for a partial year shall be made according to the schedule at enclosure 2.

6.1.5.3. Partial years of qualifying service may be combined and credited towards total qualifying service.

6.1.5.4. Membership points for any partial year shall be credited based upon the table at enclosure 3. On completion of a partial year, points for attendance at drills or equivalent instruction, prorated membership points, and points credited as a result of satisfactory participation in the DoD Health Professions Scholarship and Financial Assistance Program under 10 U.S.C. 2126(b) (reference (c)) or other service creditable for non-regular retired pay purposes shall be credited. Such points credited for a partial year may not exceed:

6.1.5.4.1. 60 points for any one anniversary year closing before September 23, 1996;

6.1.5.4.2. 75 points for anniversary years closing on or after September 23, 1996, but before October 30, 2000; ~~and~~

6.1.5.4.3. 90 points for anniversary years closing on or after October 30, 2000, but before October 30, 2007; and

6.1.5.4.4. 130 points for anniversary years closing on or after October 30, 2007.

6.1.6. Savings and Transition Procedures. On the effective date of this Instruction, all present members of a Reserve component shall retain their current anniversary date. Except as indicated elsewhere here, anniversary dates established or revised after this date, including anniversary dates for members of a Regular component, shall be based on procedures established herein.

6.2. Reserve Service Requirements to Qualify for Non-Regular Retirement.

6.2.1. To qualify for non-regular retired pay, at or after the age specified in 10 U.S.C. 12731 (reference (c)), a member must have completed 20 years of qualifying service unless otherwise provided by law. For members who completed the years of qualifying service before October 5, 1994, the last 8 years of such qualifying service must have been in a Reserve component. For members who completed the years of qualifying service on or after October 5, 1994, but before April 26, 2005, the last 6 years of such qualifying service must have been in a Reserve component. For members who completed the years of qualifying service on or after April 26, 2005, there is no minimum Reserve component service requirement. There is no requirement for required continuous years of qualifying Reserve component service. Any period of service as a member of a Regular component intervening between periods of Reserve service counted toward the 8- or 6-year requirement must be excluded in determining whether the member has 20 years of qualifying service for eligibility for non-regular retired pay. Service in a Regular component during a partial year shall be treated in the same manner as 1 full year of service in this respect.

6.2.2. A member who, after becoming entitled to Regular retired or retainer pay, serves in an active status as a member of a Reserve component, may apply for Reserve retired pay

under 10 U.S.C. Chapter 1223 (reference (c)) on or after attaining the age specified in 10 U.S.C. 12731 (reference (c)), as prescribed in 10 U.S.C. 12741 (reference (c)).

6.2.2.1. The member described in paragraph 6.2.2. is exempt from the minimum Reserve component service requirement established in 10 U.S.C. 12731(a)(3) (reference (c)).

6.2.2.2. The member described in paragraph 6.2.2. is exempt from the limitation in 10 U.S.C. 12731(a)(4) (reference (c)) that he or she not be entitled to retired pay from an armed force or retainer pay as a member of the Fleet Reserve or the Fleet Marine Corps Reserve.

6.3. Eligibility for Retirement Point Credit for Non-Regular Retirement. Members in the following categories are eligible for retirement point credit:

6.3.1. Members of a Regular or Reserve component in active service.

6.3.2. Members of a Reserve component in an active status as defined in 10 U.S.C. 10141 (reference (c)). This includes service in a Delayed Entry Program established by 10 U.S.C. 513 (reference (c)). This service is credited toward non-regular retirement since it is service in an active status as a member of the Ready Reserve.

6.3.3. Members of a Reserve component in a retired status, other than members who have retired from active service, or members transferred to the Retired Reserve under the conditions described in 10 U.S.C. 12734 (reference (c)), who are ordered to perform active duty, may be credited with active or inactive duty service.

6.3.4. Members of a Reserve component in an inactive status under 10 U.S.C. 10152 (reference (c)) may not be credited with service for retirement per 10 U.S.C. 12734(a) (reference (c)). Individuals who have completed the service requirement for retired pay and are not 60 years old may be transferred to an inactive status, but may not receive retirement point credit in that status.

6.4. Retirement Point Credit by Activity.

6.4.1. Active Service. Active service shall be credited at the rate of one point per day of active service. Active service is service on active duty or full-time National Guard duty.

6.4.2. Inactive Duty Service. Inactive duty service shall be credited as follows:

6.4.2.1. One point for each attendance at an inactive duty training (IDT) period or a period of equivalent instruction that was prescribed for that year by the Secretary concerned and conformed to the requirements prescribed by law, including attendance by a member of the National Guard at required IDT periods under 10 U.S.C. 502 (reference (c)).

6.4.2.2. A maximum of two retirement points may be credited for attendance at unit training assemblies or IDT periods in any one calendar day.

6.4.2.3. One retirement point for each day in which Funeral Honors Duty under the provisions of 10 U.S.C. 12503 (reference (c)) or 32 U.S.C. 115 (reference (h)) is performed for at least 2 hours.

6.4.2.4. One retirement point shall be credited to Reservists in an active status for each period of equivalent instruction in accordance with the following standards:

6.4.2.4.1. If the instruction is performed instead of regularly scheduled unit training assembly or IDT period, it shall be of at least the same duration as required for the assembly or IDT period it replaces.

6.4.2.4.2. If the instruction is performed as a part of a regularly scheduled unit training assembly or IDT period, only one retirement point may be credited for that period.

6.4.2.4.3. When multiple periods of equivalent instruction are performed, each period must last at least 4 hours, whether performed instead of or in addition to a regularly scheduled unit training assembly or IDT period.

6.4.2.4.4. The equivalent instruction shall be authorized and supervised by the unit commander or the commander's representative, and certification of the type and duration of the instruction shall be forwarded to the Secretary of the Military Department concerned or the Secretary's designee for that purpose.

6.4.2.5. If the instruction performed is in addition to the regularly scheduled unit training assembly or IDT period, the instruction shall last at least 4 hours and shall be performed in a nonpay status (unless a specific activity is authorized for pay by the Secretary concerned).

6.4.2.6. The Military Services may sponsor military seminars, symposia, and similar assemblies (hereafter referred to as "meetings"), either separately or in connection with professional meetings, as a means of conducting Reserve instruction. Retirement points may be granted to Ready Reservists attending such a meeting only when:

6.4.2.6.1. The meeting is designated by the Military Service concerned as being of such military value that the instruction received would enhance the Reservist's professional development and broaden either:

6.4.2.6.1.1. The Reservist's qualifications for duties to which the Reservist may be expected to be assigned upon mobilization or

6.4.2.6.1.2. The qualifications of those whose work the Reservist may supervise.

6.4.2.6.2. The meeting lasts at least 4 hours. A maximum of one retirement point per day of the meeting shall be credited.

6.4.2.6.3. The Reservist's attendance has been approved previously and, in each instance, by the Secretary of the Military Department concerned or the Secretary's designee for that purpose.

6.4.2.6.4. The Reservist either registers with a designated monitor representing the Military Service concerned or, in the absence of such a monitor, is authorized to and does certify his or her own attendance.

6.4.2.6.5. The Reservist's participation is without remuneration other than the pay to which the Reservist may be entitled as a member of a Reserve component.

6.4.2.7. Individual Ready Reservists and active status Standby Reservists may participate in civil defense activities as outlined in ~~enclosure 3 of DoD Instruction 1215.19~~ *DoD Instruction 1215.06* (reference (~~ge~~)), and may be credited with retirement points as follows:

6.4.2.7.1. A period of IDT of a duration to be determined by the Federal Emergency Management Agency, but at least 4 hours.

6.4.2.7.2. Training shall consist of civil defense work at a duly scheduled work formation in an officially designated location under active supervision.

6.4.2.7.3. Wearing of the uniform shall be optional with the individual. (This does not constitute a basis for a claim for uniform maintenance allowance.)

6.4.2.7.4. A maximum of two points for IDT may be credited per day .

6.4.2.7.5. In no case shall more than one point be credited for less than 8 hours.

6.4.2.7.6. Each volunteer Reservist shall furnish his or her respective (county, city, State, region) Civil Defense Director a certification form, which shall be signed by the Civil Defense Director attesting to the individual's satisfactory work performance and hours worked. This form shall be submitted each month or quarter in accordance with appropriate Military Department regulations.

6.4.2.8. Members of a Reserve component in an active status shall be credited with points for such membership at the rate of 15 points per year or a proportional part thereof.

6.4.2.9. Retirement points credited for activities other than active service or Funeral Honors Duty may not exceed:

6.4.2.9.1. 60 points for any one anniversary closing before September 23, 1996;

6.4.2.9.2. 75 points for anniversary years closing on or after September 23, 1996, but before October 30, 2000;

6.4.2.9.3. ~~and~~ 90 points for anniversary years closing on or after October 30, 2000, but before October 30, 2007; and

6.4.2.9.4. 130 points for anniversary years closing on or after October 30, 2007.

6.4.2.10. A maximum of two retirement points may be awarded in 1 calendar day for any activity or combination of activities and no more than one point for any day in which the member is in active service.

6.4.2.11. A person in active service may not receive retirement points for other activities performed concurrently; however, no deduction in the membership points described in paragraph 6.4.2.7-8. is required for active service, other than duty as a member of a Regular component, during an anniversary year.

6.4.2.12. A maximum of 365 points (366 points in a leap year) may be awarded in any anniversary year.

6.5. Reduced Eligibility Age for Receipt of Retired Pay for Non-Regular Service

6.5.1. A member of the Ready Reserve who serves on active duty as specified in subparagraph 6.5.2.2., or performs active service as specified in subparagraph 6.5.2.3., after January 28, 2008, shall have the eligibility age for receipt of retired pay under section 12731 of reference (c) reduced below 60 years of age by 3 months for each aggregate of 90 days on which the member serves on active duty or performs active service in any fiscal year, subject to subparagraph 6.5.3.

6.5.2. For the purpose of paragraph 6.5.:

6.5.2.1. A day of duty shall be included in only one aggregate of 90 days.

6.5.2.2. To serve on active duty means to serve pursuant to a call or order to active duty on orders specifying, as the authority for such orders, a provision of law referred to in sections 101(a)(13)(B), 688, 12301(a), 12302, 12304, 12305, 12406, and chapter 15 (insurrection) or under section 12301(d) of reference (c). Service while performing Active Guard/Reserve duty under section 12310 of reference (c) shall not be included as service on active duty under this paragraph. A member ordered to active duty under section 12301(d) of reference (c) shall receive credit for all days served regardless of the nature of the duties performed (e.g., whether performing training or operational support duties).

6.5.2.3. Active service includes service on active duty as defined in subparagraph 6.5.2.2., and full-time National Guard duty when under a call to active service by a governor and authorized by the President or the Secretary of Defense under section 502(f) of reference (f) for purposes of responding to either a national emergency declared by the President or a national emergency supported by Federal funds. Only duty performed on or after January 29, 2008, may be credited for the purposes of this paragraph. Examples include:

6.5.2.3.1. *The President's authorization for the Governors to employ the National Guard under section 502(f) of reference (f) to secure U.S. airports following the terrorist attacks of September 11, 2001.*

6.5.2.3.2. *The Deputy Secretary of Defense's authorization for the Governors to employ the National Guard under section 502(f) of reference (f) to assist in the aftermath of Hurricane Katrina.*

6.5.2.3.3. *The President's authorization for the Governors to employ the National Guard under section 502(f) of reference (f) to assist the Department of Homeland Security in securing the southwest borders of the United States.*

6.5.2.3.4. *The President's authorization for the Governors to employ the National Guard under section 502(f) of reference (f) to support a National Special Security Event as designated by the Department of Homeland Security such as the 1996 Summer Olympics, the 2000 Winter Olympics, or the 2005 G8 Summit.*

6.5.2.4. *The orders issued to members of the National Guard for service under section 502(f) of reference (f) shall cite the circumstances calling for the service, as appropriate, as listed in subparagraph 6.5.2.3.*

6.5.3. *The eligibility age may not be reduced below 50 years of age for any person described in subparagraph 6.5.1.*

7. **RELEASABILITY**. **UNLIMITED**. *This Instruction is approved for public release. Copies may be obtained through the Internet from the DoD Issuances Web Site at <http://www.dtic.mil/whs/directives>.*

78. **EFFECTIVE DATE**

This Instruction is effective immediately.



David S. C. Chu
Under Secretary of Defense
(Personnel and Readiness)

Enclosures - 3

- E1. References, continued
- E2. Minimum Retirement Point Credit Chart
- E3. Pro-rating Reserve Membership Points

E1. ENCLOSURE 1

REFERENCES, continued

- ~~(e) DoD Instruction 7730.54, "Reserve Components Common Personnel Data System, —(RCCPDS)," August 6, 2004~~
- ~~(f)(e) DoD Directive 1215.6; DoD Instruction 1215.06, "Uniform Reserve, Training and Retirement Categories," March 14, 1997-February 7, 2007~~
- ~~(g) DoD Instruction 1215.19, "Uniform Reserve, Training and Retirement Category Administration," December 12, 2000~~
- ~~(h)(f) Sections 115 and 502 of title 32, United States Code~~

E2. ENCLOSURE 2MINIMUM RETIREMENT POINT CREDIT CHART

Number of Days in an Active Status		Minimum Points Required
From	Through	
0	8	1
9	14	2
15	21	3
22	29	4
30	36	5
37	43	6
44	51	7
52	58	8
59	65	9
66	73	10
74	80	11
81	87	12
88	94	13
95	102	14
103	109	15
110	116	16
117	124	17
125	131	18
132	138	19
139	146	20
147	153	21
154	160	22
161	168	23
169	175	24
176	182	25
183	189	26
190	197	27
198	204	28
205	211	29
212	219	30
220	226	31
227	233	32

E2. ENCLOSURE 2MINIMUM RETIREMENT POINT CREDIT CHART, continued

Number of Days in an Active Status		Minimum Points Required
From	Through	
234	240	33
241	248	34
249	255	35
256	262	36
263	270	37
271	277	38
278	284	39
285	292	40
293	299	41
300	306	42
307	313	43
314	321	44
322	328	45
329	335	46
336	343	47
344	350	48
351	357	49
358	365	50

E3. ENCLOSURE 3

PRO-RATING RESERVE MEMBERSHIP
POINTS

<u>Number of Days in Active Status</u>		<u>Membership Points To Be Credited</u>
<u>From</u>	<u>To</u>	<u>Points</u>
1	12	0
13	36	1
37	60	2
61	85	3
86	109	4
110	133	5
134	158	6
159	182	7
183	206	8
207	231	9
232	255	10
256	279	11
280	304	12
305	328	13
329	352	14
353	365 (366 leap year)	15