

Transfer of Education Benefits
Portlet
v. 2.00
User Manual

Abstract This guide describes how to use the Transfer of Education Benefits Portlet , which allows Service Members to transfer their education benefits to their family members.

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1.0 Overview of the Transfer of Education Benefits Portlet

The Transfer of Education Benefits (TEB) Portlet allows current Service Members to submit requests to transfer their education benefits to one or more of their family members. The TEB Portlet also allows current and separated Service Members to modify transfer requests that have already been submitted.

Note: Separated Service Members can modify their transfer requests after separating from the Service only if they have a valid Common Access Card (CAC), DoD Self-Service Logon (DS Logon), or DFAS Account (myPay). Service Members who do not have a DS Logon and are nearing their obligation end date (separation date) should request a DS Logon before separation (see Appendix: Requesting a DS Logon on page 16 for more information).

After transfer requests are submitted, Service Representatives use the Transfer of Education Benefits for Service Representatives (TEB-SR) Web Application to verify and either approve or reject these requests. Approved transfer requests are sent via database replication to the Department of Veterans Affairs (DVA) for claims processing and administration of benefits.

The TEB Portlet allows authorized users to access and update information using Microsoft's Internet Explorer web browser. This document describes the features of the TEB Portlet.

1.1 Safeguarding Confidential Information

Only users authorized by the Defense Manpower Data Center (DMDC) may access the TEB Portlet. Furthermore, only authorized users may view information or be informed in any way of information available in the TEB Portlet. Every authorized user must safeguard the confidentiality of such information at all times to comply with the Privacy Act of 1974. Before leaving your PC unattended, be sure to log off the application. You can also lock your workstation for added security. See your system administrator for instructions.

1.2 Privacy Act Notice

Due to Privacy Act considerations, protected information such as names, Social Security Numbers (SSNs), and birth dates have been fabricated for the examples in this document.

2.0 Summary of Application Functions

The functions and roles of Service Members and Service Representatives in the TEB Portlet and the TEB-SR Web Application are as follows:

Current and separated **Service Members** can use the TEB Portlet to perform the following functions:

- Current Service Members can initiate and modify their requests to transfer education benefits to one or more family members. Separated Service Members can modify the transfer requests they submitted prior to their separation. Modifications to a transfer request include:
 - Adding family members to an existing transfer request (Separated Service Members cannot add family members.).
 - Modifying the transfer months or the transfer end dates for family members.
 - Revoking the transfer of education benefits to family members.
- Both current and separated Service Members can check the status of their submitted transfer requests.

Service Representatives can use the TEB-SR Web Application to perform the following roles and functions (which are described in the *Transfer of Education Benefits Web Application for Service Representatives User Manual*):

Act as an application reviewer to:

- Approve or reject requests to transfer education benefits.

Act as a surrogate for a Service Member to:

- Initiate or modify transfer requests on behalf of current Service Members and modify transfer requests on behalf of separated Service Members. Modifications to a transfer request include:
 - Adding family members to existing transfer requests.
 - Modifying the transfer months or the transfer end dates for family members.
 - Revoking the transfer of education benefits to family members.
- Check the status of transfer requests submitted on behalf of current and separated Service Members.
- Print approval confirmation forms on behalf of current and separated Service Members.
- Generate transfer request reports by status (Submitted, Request Approved, Request Rejected, or Pending Review) or by status date then export them.

Note: A Service Representative's application access level determines what functions he or she can perform in the TEB-SR Web Application. Some Service Representatives may not be able to approve or reject transfer requests, or act as a surrogate, or either.

3.0 Education Benefit Programs

When you submit your transfer request, the Post-9/11 GI Bill program must be selected. You may be eligible for multiple education benefit programs, but currently the Post-9/11 GI Bill program is the only education benefit program that the TEB Portlet and the TEB-SR Web Application support. By initiating a transfer request under the Post-9/11 GI Bill, you are making an irrevocable decision to convert over to that education benefit program.

4.0 Eligibility Requirements

You must meet specific eligibility requirements in order to transfer education benefits (months) to your family members. Your family members must be both eligible to receive transferred benefits and subsequently to use those benefits.

Note: For more information on eligibility requirements, refer to the Transferability Fact Sheet available at http://www.defense.gov/home/features/2009/0409_gibill/. If you have questions about the eligibility of your family members or about the information displayed in the TEB Portlet, please contact your command career counselor, educational officer, or retention officer. See 7.0 Requesting Assistance on page 15 for contact information.

4.1 Eligible Service Members

You are eligible to transfer benefits under the Post-9/11 GI Bill if you are a member of the Armed Forces (active duty or Selected Reserve, officer or enlisted) and meet one or more of the following requirements:

- You have at least six years of service in the Armed Forces on the date you elect the Post-9/11 GI Bill program and agree to serve an additional four years in the Armed Forces from that date.
- You have at least ten cumulative years of service in the Armed Forces (active duty and/or Selected Reserve) on the date of election, are precluded by either standard policy (service or DoD) or statute from committing to an four additional years, and agree to serve for the maximum amount of time allowed by such policy or statute.
- You have become or will become retirement eligible during the period from August 1, 2009, through August 1, 2013. A Service Member is considered to be retirement eligible if he or she has completed 20 years of active duty or 20 qualifying years of reserve service.

4.2 Eligible Family Members

If you are eligible to transfer benefits to your family members, your family member must meet the following requirements before education benefits (months) can be transferred to them:

- They must be reported in the Defense Enrollment Eligibility Reporting System (DEERS) and be eligible for benefits as defined by law. Only current spouses are eligible. By law, children under 21 years of age are eligible. Children are defined as natural children, step children (the

children of your current spouse), pre-adoptive and adopted children. Foster children and wards are not eligible regardless of age (Title 38, USC).

- If the child or children are 21 years of age or older, they may be eligible if they meet the following criteria:
 1. They are 21 or older, but less than 23 years old, and are enrolled in a full-time course of education.
 2. They are 21 or older, but less than 26 years old, and were determined before their 18th birthday to be permanently incapacitated and incapable of self-support.

When you initiate a transfer request (see 5.2, “Initiating a Transfer Request” on page 7) in the TEB Portlet, ineligible family members who are not children, such as divorced spouses, are not displayed. Some ineligible children, however, may be displayed for informational purposes. For example, foster children, wards, and children between the ages of 21 and 26 who are not eligible are displayed, but months cannot be transferred to them. An ‘(ineligible)’ label appears after the relation(ship) of that child in those cases.

However, when you edit your transfer request, all family members who have had months transferred to them are displayed as eligible, even if they have become ineligible due to an event such as divorce or death. Children who are between the ages of 23 and 26 and are no longer eligible to have months transferred to them, and children over the age of 26 who have had months transferred to them, but are no longer eligible to use them (see 4.3, “Usage Eligibility” below) are also displayed. In these cases, you can edit the number of months transferred to those family members, either by reducing the number of months transferred or revoking all months transferred.

4.3 Usage Eligibility

Once benefits (months) have been transferred to your family members, those family members can use them as follows:

- Your spouse can start to use the transferred benefit immediately provided you have met the minimum six years of service requirement. Your spouse can continue to use the benefit while you remain in the service and for up to 15 years after you separate from active duty.
- Your eligible children can start to use the transferred benefit only after you have completed at least 10 years of service in the Armed Forces (active duty and/or Selected Reserve). They can continue to use their benefit up until their 26th birthday. Eligible children cannot use the benefit until they have earned a secondary school diploma (or equivalency certificate), or reached 18 years of age.

Your child’s subsequent marriage will not affect his or her eligibility to use a transferred benefit. However, you have the right to revoke or edit the benefit transfer at any time.

Divorce will not automatically affect an ex-spouse’s or former step child’s eligibility to use a transferred benefit. Again, you have the right to revoke or edit the benefit transfer at any time.

5.0 Using Transferred Benefits

After your transfer request is approved, your request data is sent to the Department of Veterans Affairs (DVA). Each family member must first apply for a certificate of eligibility from the DVA before they can use their transferred benefits. Once the DVA receives the request data and VA Form 22-1990E, they will be able to process your family members' requests to use their benefits.

The application for the certificate of eligibility (VA Form 22-1990E) can be found through the Department of Veterans Affairs' VONAPP Web Site (<http://vabenefits.vba.va.gov/vonapp/main.asp>). A paper form is also available at <http://www.vba.va.gov/pubs/forms/VBA-22-1990e-ARE.pdf>. Or you can call the DVA for Education Benefits information at 1-888-GIBILL1.

Note: Adobe Reader is required to open and print the PDF file. You can download the free Adobe Reader from www.adobe.com. Follow the instructions to download Adobe Reader.

5.1 Overview of the TEB Portlet Page

The TEB Portlet provides Service Members the means to do the following:

1. Initiate a request to transfer education benefits to one or more of your family members (see 5.2, “Initiating a Transfer Request” on page 7).
2. Modify a previously submitted transfer request by doing one of the following:
 - Adding a family member to the transfer request (see 5.3, “Adding a Family Member to an Existing Transfer Request” on page 9).
 - Editing the transfer months or the transfer end date for a family member (see 5.4, “Editing a Transfer Request” on page 10).
 - Revoking the transfer of education benefits (months) to a family member (see 5.5, “Revoking Transferred Months” on page 11).
3. Submit or resubmit an initial or modified transfer request or resubmit a rejected transfer request (see 5.6, “Submitting and Resubmitting Transfer Request” on page 12).

The TEB Portlet page is divided into multiple sections: the Sponsor section, the Message from Your Service Component section, the Educational Benefit Program selection section, the List of Family Members section, and the Transferability of Education Benefits Acknowledgements section.

The **Sponsor** section at the top left of the page shows the following information:

- **Name** – Your full name.
- **Rank** – Your rank.
- **Status** – The review Status (Submitted, Request Approved, Request Rejected, or Pending Review) of your transfer request. If your transfer request has been rejected by a Service Representative, the reason for the rejection appears to the right of the Status.
- **Status Date** – The date the Service Representative reviewed the transfer request and set it to Request Approved, Request Rejected, or Pending Review.
- **Obligation End Date** – If your transfer request has been approved, the projected date that your obligated service commitment will be completed. This date is entered by the approving Service Representative.
- **Reject Reason** – If your transfer request has been rejected by a Service Representative, the reason for the rejection also displays.

The **Message from Your Service Component** section at the top right displays a message that applies to your Service component if a message is available. These messages normally pertain to transferability procedures. If the entire message is not displayed, you can use the scroll bar at the right.

The **Educational Benefit Program selection** section shows the benefit programs that you can transfer to your family members. (Currently, the “Post-9/11 GI Bill Chapter 33” program is the only benefit available to transfer.)

The **List of Family Members** section contains a table that displays your family members. Both eligible and some ineligible family members display in this table (see 4.2, “Eligible Family Members” on page 3). The columns in the table are as follows:

- **Relation** – The relationship of the family member to you.
- **Name** – The full name of the family member.
- **Birthdate** – The date of birth of the family member.
- **Begin Date** – The date the family member can start to use the transferred benefit. This date defaults to the current date for all family members when the initial transfer request is submitted. If the transfer request is rejected and resubmitted, this date defaults to the date of resubmission for all family members. If months are transferred to a new family member after the transfer request’s initial submission, or months are transferred to a family member who had months revoked, this date defaults to the date of resubmission for just that family member.
- **End Date** – The date that the family member’s education benefit terminates. This date is optional.
- **Months** – The number of months of benefit you have transferred to the selected family member. The total transferred to all family members cannot exceed 36 months.
- **Revoke Date** – The date that the transfer of the family member’s education benefit was revoked. This date is automatically populated when the benefit is revoked.

The **Transferability of Education Benefits Acknowledgements** section at the bottom of the page shows the acknowledgements for transferability. Before submitting your initial transfer request, you will be required to agree to the acknowledgements by selecting the check box next to each acknowledgement. If your transfer request is rejected, you will again be required to agree to each acknowledgement.

5.2 Initiating a Transfer Request

If you are a current Service Member, you can initiate a transfer request by transferring education benefits (months) to one or more of your family members. You can only transfer months to family members who are eligible at the time of the transfer (see 4.2, “Eligible Family Members” on page 3).

Note: Service Members must request that benefits be transferred to the appropriate family members before separating from the Service. Once a separated service member’s transfer request is approved and sent to the DVA, family members cannot be added to the request.

If you submit a transfer request without transferring any months to a particular family member, months cannot be transferred to that family member after you separate from the Service. For example, say you submit a transfer request that transfers months to only one of your children and your transfer request is subsequently approved. You then separate from the Service. After you separate from the Service, you decide to transfer months to another child. Unfortunately, this is not possible because this child had no months transferred to him/her on the original transfer request.

If you think you might want to transfer months to additional family members after you separate from the service, you should transfer at least one month to each of those family members. If the family members later do not need the benefits (months), the transfer of the months can be revoked (see 5.5, “Revoking Transferred Month” on page 11).

To initiate a transfer request and transfer months:

1. From the table in the List of Family Members section, locate the name of the appropriate, eligible family member.
2. Click the **Months** arrow in the family member’s row to select the number of months of your education benefit you wish to transfer to the selected family member. The total of months transferred cannot exceed 36 for all family members.
3. Optionally, click in the **End Date** box to enter an end date in YYYY-MM-DD format. The end date is the date you wish to terminate the selected family member’s benefit. A date should **ONLY** be specified if you wish to terminate the family member’s benefit on a specific date. If you leave this date blank, the date will be determined by law (for spouses – 15 years from your separation date, for children – age 26). If specified, this date cannot be before the current date.

Note: Click **Cancel Request** to discard any changes you have made.

If you wish to transfer months to another family member, click the **Months** arrow in the family member’s row and return to step 2.

When finished, please be sure to submit your transfer request (see 5.6.1, “Submitting an Initial Transfer Request” on page 12).

5.3 Adding a Family Member to an Existing Transfer Request

You can add additional eligible family members to a transfer request if you are a current Service Member and if the transfer request has a status of 'Request Approved', 'Request Rejected', or 'Submitted'. You cannot add additional family members to transfer requests in a 'Pending Review' status.

To add a family member to a transfer request:

1. In the table in the List of Family Members section, locate the name of the family member to be added.
2. Click the **Months** arrow in the family member's row to select the number of months of your education benefit you wish to transfer to the selected family member. The total of months transferred cannot exceed 36 for all family members. Optionally, click in the **End Date** box to enter an end date in YYYY-MM-DD format. The date you wish to terminate the selected family member's benefit. A date should **ONLY** be specified if you wish to terminate the family member's benefit on a specific date. If you leave this date blank, the date will be determined by law (for spouses – 15 years from Service Member's separation date, for children – age 26). If specified, this date cannot be before the current date.

Note: Click **Cancel Request** to discard any changes you have made.

If you wish to add another family member, click the **Months** arrow the family member's row, and return to step 2.

When finished, please be sure to resubmit your transfer request (see 5.6.2, "Submitting a Modified Transfer Request" on page 13).

5.4 Editing a Transfer Request

You can edit the transfer end date and transfer months for one or more of the family members on your transfer request if the transfer request has a status of ‘Request Approved’, ‘Request Rejected’, or ‘Submitted’. Transfer requests with a ‘Pending Review’ status cannot be edited; they can, however, be viewed.

When you edit a transfer request, all family members to whom months have been transferred display even if not all of these family members are still eligible (see 4.2, “Eligible Family Members” on page 3). In many of these instances, you may want to consider revoking the unused months that were transferred to family members who are now ineligible (see 5.5, “Revoking Transferred Months” on page 11).

Note: When an approved request is edited and resubmitted, it does not go back to the Service Representative for additional verification.

To edit your transfer request:

1. In the table in the List of Family Members section, locate the name of the appropriate family member to be edited.
2. Click the **Months** arrow in the family member’s row to change the number of months of your education benefit you wish to transfer to the family member. The total of months transferred cannot exceed 36 for all family members.
3. Optionally, click in the **End Date** box to enter an end date in YYYY-MM-DD format. This is the date you wish to terminate the selected family member’s benefit. A date should **ONLY** be specified if you wish to terminate the family member’s benefit on a specific date. If left blank, this date is determined by law (for spouses – 15 years from Service Member’s separation date, for children – age 26). If a date is specified, it must be the current date or later.

Note: Click **Cancel Request** to discard any changes you have made.

If you wish to edit the transfer information for another family member, click the **Months** arrow of the family member’s row, and return to step 2.

When finished, please be sure to resubmit your transfer request (see 5.6.2, “Submitting a Modified Transfer Request” on page 13).

5.5 Revoking Transferred Months

You can change a transfer request by revoking the months transferred to a specific family member or members. You can only revoke the transfer of months if your transfer request has been approved (has a status of 'Request Approved'). You cannot revoke months if the transfer request has a status of 'Request Rejected', 'Submitted', or 'Pending Review'.

Revoking the months transferred to a family member does not preclude transferring months to that family member at some future date as long as the family member is still eligible.

To revoke transferred months:

1. In the table in the List of Family Members section, locate the name of the appropriate family member.
2. Click the **Revoke** check box in the family member's row.

Note: Click **Cancel Request** to discard any changes you have made.

When finished, please be sure to submit your transfer request (see 5.6, "Submitting and Resubmitting Transfer Request" on page 12).

5.6 Submitting and Resubmitting Transfer Requests

You must submit or resubmit a transfer request after it has been initiated, modified, or rejected using one of the following procedures:

- To submit an initial transfer request (see 5.6.1, “Submitting an Initial Transfer Request” below).
- To submit modifications to a transfer request (see 5.6.2, “Submitting a Modified Transfer Request” on page 13).
- To resubmit a rejected transfer request (see 5.6.3, “Resubmitting a Rejected Transfer Request” on page 13).

5.6.1 Submitting an Initial Transfer Request

After initiating a request to transfer benefits to one or more of your family members (5.2, “Initiating a Transfer Request” on page 7), you must submit it.

To submit an initial transfer request:

1. Select the **Post-9/11 GI Bill Chapter 33** option. (Currently, the “Post-9/11 GI Bill Chapter 33” program is the only benefit available to transfer.)

An acknowledgement dialog opens.

2. Read the acknowledgement statement indicating that transferring education benefits requires you to convert your education benefits to the Post-9/11 GI Bill Chapter 33 program, and click **OK**.
3. In the Transferability of Education Benefits Acknowledgements section, read the acknowledgements, and select the check box next to each to indicate that you understand and agree to them.

Note: To cancel the submission and discard your changes, click **Cancel Request**.

4. Click **Submit Request**.

- If the submission is successful, a confirmation message displays.

To print a copy of the TEB Portlet page to verify your submission, select the Print option from your browser.

- If no months have been transferred to any of your family member, a message displays in the message bar. You must transfer months to at least one family member to submit your transfer request.
- If no months have been transferred to one or more of your family members, a Warning dialog opens.

In the dialog, click **OK** to submit your transfer request as is, or click **Cancel** to return to the Home page.

When the submission completes successfully, the Status in the Information section at the top of the page displays ‘Submitted’.

5.6.2 Submitting a Modified Transfer Request

If you modify your transfer request, it must be submitted again. You can modify a transfer request by adding family members to it, editing it, or revoking transferred months (see 5.3, “Adding a Family Member to an Existing Transfer Request” on page 10, 5.4, “Editing a Transfer Request” on page 10, or 5.5, “Revoking Transferred Month” on page 11).

Note: When you submit a modified transfer request, you do not need to reselect the **Post-9/11 GI Bill Chapter 33** option or the Transferability of Education Benefits acknowledgements check boxes.

To submit a modified transfer request:

► Click **Submit Request**.

- If the submission is successful, a confirmation message displays.

To print a copy of the TEB Portlet page to verify your submission, select the Print option from your browser.

- If no changes have been made to the transfer request, an error message displays.
- If no months have been transferred to one or more of your family members, a Warning dialog opens.

Note: You will get this message if you have revoked the months transferred to a family member.

In the dialog, click **OK** to submit your transfer request as is, or click **Cancel** to return to the Home page to transfer months to the family member(s).

When the submission completes successfully, the Status in the Information section at the top of page remains as it was, either ‘Request Approved’ or ‘Submitted’.

5.6.3 Resubmitting a Rejected Transfer Request

If a Service Representative rejects your transfer request (set the status to Request Rejected), you must resubmit it. You do not need to modify a transfer request that has been rejected, but it can be edited if needed (see 5.4, “Editing a Transfer Request” on page 10).

To resubmit a rejected transfer request:

1. In the TEB Portlet page, select the **Post-9/11 GI Bill Chapter 33** option if required.

An acknowledgement dialog opens.

2. Read the acknowledgement statement indicating that transferring education benefits requires you to convert your education benefits to the Post-9/11 GI Bill Chapter 33 program, and click **OK**.

3. In the Transferability of Education Benefits Acknowledgements section, read the acknowledgements, and select the check box next to each to indicate that you understand and agree to them if required.

Note: To cancel the submission and discard your changes, click **Cancel Request**.

4. Click **Submit Request**.

If the submission is successful, a confirmation message displays.

To print a copy of the TEB Portlet page to verify your submission, select the Print option from your browser.

When the submission completes successfully, the Status in the Information section at the top of the page displays 'Submitted'.

6.0 Checking the Status of a Transfer Request

You can use the TEB Portlet to check on the status of your transfer request.

- ▶ Simply log on to the TEB Portlet. The status of your transfer request displays in the Information section at the top of the page.

Note: If the status of your request is 'Pending Review', please check back at a later date, or you can contact your Service Representative (see 7.0 Requesting Assistance on page 15 for contact information).

7.0 Requesting Assistance

To view contact information from within the TEB Portlet, click the **Contact Us** tab at the top of the TEB Portlet page.

For general or specific questions about the Post-9/11 GI Bill, or to determine your remaining months of entitlement, contact the Department of Veterans Affairs (DVA) at 1-888-GI-BILL-1 (1-888-442-4551) to speak with a Veterans Benefits Counselor or visit their website at <http://www.gibill.va.gov/>. After your transfer request is approved, each of your family members should apply for a certificate of eligibility so that they can use their transferred benefits (see 5.0, “Using Transferred Benefits” on page 5).

Do NOT call the DVA with questions about your eligibility to transfer education benefits. For general policies concerning the transferability of education benefits, refer to the following web site: http://www.defenselink.mil/home/features/2009/0409_gibill/.

For specific questions about your eligibility, the eligibility of your family members, and service specific questions about the TEB Portlet, please contact the appropriate career counselor or personnel center from the following list:

Army Active Duty: g1post911gibill@conus.army.mil

Army National Guard: gibill@pec.ngb.army.mil

Army Reserve: post911gibill@conus.army.mil

Navy Active Duty: Navy Personnel Command CUSTOMER SERVICE CENTER
1-866-U-ASK-NPC (1-866-827-5672)/DSN 882-5672

Navy Reserve: 1-800-621-8853, Fax: (757) 444-7597/7598
cnrfc_post911gibill@navy.mil

Marine Corps Active Duty: daryl.patrick@usmc.mil

Marine Corps Reserve: smb_manpower.cmt@usmc.mil

Air Force Active Duty: 1-800-525-0102 or 210-565-5000 or DSN 665-5000

Air National Guard: Contact one of the Retention Office Managers at your unit.

Air Force Reserve: julia.williamson@us.af.mil

Coast Guard Active Duty: laurence.a.fernandez@uscg.mil

Coast Guard Reserve: reserveVAeducation@uscg.mil

Appendix: Requesting a DS Logon

If you are a current Service Member, you can log on to the TEB Portlet through the myDODbenefits Portal using one of three methods:

- Common Access Card (CAC)
- DoD Self-Service Logon (DS Logon)
- DFAS Account (myPay)

Note: If you are a separated Service Member, you can also log on to the TEB Portlet through the eBenefits Portal using a Level 2 DS Logon.

If you have a CAC or DFAS Account, you may request a DS Logon for yourself and eligible family members via the DS Access Center at <https://myaccess.dmdc.osd.mil/appj/dsaccess/index.jsp>.

If you do not have a CAC or DFAS Account, you can request a DS Logon at a DoD RAPIDS facility when obtaining your military identification card. To locate a RAPIDS facility, visit <http://www.dmdc.osd.mil/rsl/>.

If you are separated from the Service, you can also use the above three methods to log on to the TEB Portlet to modify a transfer request submitted prior to separation. However, after separation you may no longer be authorized to use one or more of these log on methods. Before separation, you should consider obtaining a DS Logon if you do not have one. Although you can obtain a DS Logon after separation, it is easier to obtain one prior to separation via the DS Access Center. After separation, you must request a DS Logon at a VA Regional Office after completing an in person proofing process. To locate a VA Regional Office in your state or outside the U.S., visit <http://www.vba.va.gov/vba/benefits/offices.asp>.