

# Michigan Volunteer Defense Force

## Retirement Services Policy 5-1

### 1-1 Basic requirements to volunteer for the Retirement Services Officer program.

- A. Be an active status drilling soldier with the MI-VDF.
- B. Obtain a recommendation from your battalion commander.
- C. Have a computer with an internet connection.
- D. Have an above average skill level with computer programs including the Microsoft Office suite.
- E. Have a driver's license and vehicle.
- F. Be available for at least 3-4 hours a month for retirements or retirement counseling.
- G. Willing to attend training sessions in the battalion area.
- H. Willing to complete the required basic level training within a reasonable time (150 days).
- I. Able to pass an FBI background check and qualify for a Volunteer Access Card (VOLAC).
- J. Willing to agree to a 12 month commitment to the MI-VDF RSO program after the training is completed.

These are the basic requirements to become a Retirement Services Officer. The required training is very technical and challenging. Currently there are four online courses and four hands-on training sessions. Each of the online and hands-on training sessions requires passing a test with a minimum score of 70%.

### 1-2 Internship.

After completing the required training, there will be an internship required before a soldier will be allowed to perform as a Retirement Services Officer. This internship will require working alongside a certified RSO for at least five retirement services sessions or until the RSO is willing to sign off on the soldier's ability to perform the services needed.

Any questions regarding these basic requirements should be addresses to the soldier's chain of command or the OIC for the MI-VDF RSO program.

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### 1-3 Rank Policy for Retirement Services Officer.

Once online requirements, basic and intermediate classroom training sessions, and internship have been fulfilled, the RSO's minimum rank will be changed to no less than an E-5. MI-VDF members of higher rank will retain their current ranks. This minimum rank provides assurance to retirees that he has been certified and has the skills to handle their retirement process.

A. If a soldier is removed, voluntarily or involuntarily, from the MI-VDF RSO program, his rank will be adjusted to the rank he would have held if never served in the RSO program.

B. After one full year of satisfactory serving as a Retirement Services Officer, soldiers in the grade of E-5 will be automatically promoted to the rank of E-6.

C. Basic time in grade requirements apply for promotion beyond the rank of E-6.

### 1-4 Address or Status Changes.

The MI-VDF RSO will keep the RSO OIC informed of any changes in his drilling status and also of any phone number changes or address changes.

### 1-5 Deployment.

Once the RSO OIC is contacted of a retirement services mission, the MI-VDF RSO OIC will contact the RSO in the MI-VDF battalion AO that is available to carry out the mission.

A. While serving on legitimate RSO duty, the RSO is authorized to wear his ACU uniform without prior written authorization.

B. After accepting the RSO mission, the RSO OIC will send a notification to the RSO's battalion commander or his designate of the task required with date and time of required service.

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C. If a conflict exists in the soldier's schedule with the RSO mission and his assigned battalion duty, it is the responsibility of that soldier to contact his chain of command and the RSO OIC to work the details out. If he is unable to reach a settlement, it will be brought to the attention of the Brigade Chief of Staff or S-3 to resolve.

D. While serving with the MI-VDF RSO program, the RSO will need to obey military regulations and act in accordance with military customs and courtesies. Proper uniform standards will be enforced.

Remember: RSOs are not only representing the Michigan Volunteer Defense Force but also the Michigan National Guard as a whole.

### **1-6 Confidentiality and Security.**

A. MI-VDF RSOs must maintain the highest level of confidentiality. All personally identifiable information (PII) must be protected and secured at all times.

B. Each MI-VDF RSO will complete the annual Department of Defense Cyber Awareness Challenge course.

C. No personal or private storage of a retiree's records or other personal information will be kept or stored by the MI-VDF RSO. All information will be sent to the Retirement Points Accounting Management (RPAM) NCO at the Michigan National Guard state headquarters and subsequently deleted from the RSO's computer.

D. The use of a National Guard computer system is for legitimate retirement services business only. No personal business may be conducted on these systems. Any abuse by MI-VDF personnel will result in cancellation of the RSO's VOLAC and termination of RSO status. Criminal prosecution or other disciplinary actions may also occur.

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### 1-7 Release From Duty

A. An MI-VDF RSO can be released from duty for cause by the brigade commander or his designate.

B. An MI-VDF RSO can be released from duty for cause by the Michigan National Guard Retirement Services OIC or the RPAM NCO.

C. If the MI-VDF RSO wishes to be released from the RSO program, he will notify his chain of command and the RSO OIC in writing. All records, paperwork, and issued materials and equipment will be returned to his chain of command promptly.