



Things to Think About!

Form DD 137's Made Easier (Sort Of)

By Linda Jorgensen

One of my least favorite chores is completing forms and doing the paperwork required to submit a request for a Secondary Dependency letter for our adult daughter. It makes no difference that she has been enrolled in DEERS, EFMP and ECHO for most of her life, the military still requires us to prove that she remains disabled and dependent on my husband and I for at least 51% of her care and support. All of this for a single ID card which allows her access to a military base. Once my National Guard husband reaches the age of retirement (currently age 60) he'll draw his retirement and we'll be eligible for Tricare for Life. But that's still a few years from now. In the meantime, we do the paperwork to keep the ID card.

Form review can take anywhere from 2 to 6 weeks so ensuring your paperwork and supporting documentation are complete before you send them is very important. Be sure to submit them at LEAST 90 days before the expiration of your dependent's ID card!

Do Your Research

Each branch of service has a slightly different requirement for some sections of the form and each branch has a separate Secondary Dependency Team that reviews them. They are all located at different bases. Start by doing a search for an instruction sheet for your branch of service. A search for [Form DD 137 Expenses Breakdown](#) will take you to a list that includes all branches of service. Look for the one for your branch of service with the most current date on it. This will give you the information you'll need to be collecting for the 12 months prior to the application submission.

Be sure you have located the proper office and address for your branch of service to submit the form to when you've completed it.

Start Early

This set of forms requires reporting 12 months of various expenses. It is important to keep track of ALL of the expenses requested. Set up a filing system for receipts. A notebook with a monthly entry for each expense required a file for receipts (used as source documents and proofs. Especially for those Tricare expenses if you're using Tricare! That will be the "Value of the USIP"), start a spread sheet, etc. Whatever it is, get a way to track your expenses in place and then use it!

Don't!

There are several things that can cause problems for the Secondary Dependency Team when making a determination. It's important to ensure the process goes as smoothly as possible in order to ensure your secondary dependency determination letter arrives.

- DO NOT pro-rate expenses. List ALL expenses related to the home for all persons in the home regardless of who pays for them. Do **NOT** pro-rate these figures. The Determination teams have their own formula they use to come up with the amounts used as the dependent's portion.
- Do NOT add anything to your dependent's personal expenses section. This section should include **ONLY YOUR CLAIMED DEPENDENT'S PERSONAL EXPENSES REGARDLESS OF WHO PAYS FOR THEM.**

- Don't forget to sign the document in front of notary and have the document notarized BEFORE sending. Un-notarized documents will be returned to sender without a determination.

Do!

- Read and follow instructions closely. Take your time and double check your entries. Have someone proof read the form for you if need be.
- Enclose copies of all requested proof documents. ESPECIALLY Tricare Explanation of Benefit (EOB) forms, Medical Cost Estimate Forms from military medical facility patient administration offices (lists the value of medical visits to a military medical facility, required as proof for Value of the USIP), and decreased medication cost forms (EOBs from Tricare or your local pharmacy. These forms report out-of-pocket expenses).
- List ALL transportation expenses. This includes all expenses related to transporting your dependent. The destination does not matter. If you are spending money to transport your dependent, report it. Bus and cab fare, gas, oil, tires, maintenance for the vehicle, etc. This is especially important for vehicles with wheelchair lifts.
- Do use **Box 14. REMARKS** to make explanations or show how an amount was calculated.
- Follow instructions for signature and notarization exactly.
- **DO INCLUDE** copies of any Court Incapacitation/Findings of Fact & Conclusions of Law **AND** Court Letters of Guardianship if you have them.
- **Make a copy of the entire package of documentation for your record, just in case.**
- **Send completed application with proof documents to the proper Defense Accounting and Finance Service office for your branch of service.**

By starting early, keeping good records and following instructions the process of submitting a request for a positive Letter of Secondary Dependency will be easier and less stressful. Take your time and don't rush and follow instructions closely. If you receive a request for information, explanation or other requirements from the Secondary Dependency Team reviewing your application respond IMMEDIATELY! The longer you take to respond to their request, the longer you will have to wait for your letter. No letter, no USIP/ID card. Your best bet is to include all the documentation listed and be sure to use Box 14 REMARKS for any explanations you feel need to be made, the first time.

Lastly, keep a copy of the entire document and supporting documentation on file. You'll find yourself referring to it the next time your dependent needs a new ID card.

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