

Survivor Benefit Plan Annuitant Eligibility Verification Quick Reference

What Changed in 2023

Please see our webpage for FAQs: <https://www.dfas.mil/managesbp>

DFAS simplified the eligibility verification process for SBP annuitants as of August 2023.

Now, SBP annuitants who need to verify their continued eligibility for SBP annuity payments will only need to provide **ONE annual verification each year.**

Annual Verification Types (as of August 2023)

Survivor Benefit Plan-Marital Status Update (SBP-MSU)



The **Survivor Benefit Plan-Marital Status Update (SBP-MSU)** is required annually to confirm marital status and continued eligibility for the Survivor Benefit Plan. The SBP-MSU replaces the COE.



Due the first day of the month of annuitant's birthday.

Foreign Address Update for Mailed Check (FAUMC)



The **Foreign Address Update for Mailed Check (FAUMC)** is required **annually from annuitant's** receiving a check in the mail outside the United States if they don't need to submit a School Certification or a Survivor Benefit Plan-Marriage Status Update. The FAUMC replaces the ROE.



Due the first day of the month of annuitant's birthday.

School Certification



The DD Form 2788 Child Annuitant's **School Certification** and the Child Annuitant's Certification for **Previous Attendance Letter** are required annually to confirm full-time school attendance and marital status for continued eligibility for the Survivor Benefit Plan. *Note: School Certification requirements did not change.*



Due the first day of the month annuitant's school year ends.

Summary of New, Simpler Annual Verification Requirements

If you are:

Spouse/former spouse annuitant under the age of 55, the



Survivor Benefit Plan-Marital Status Update is your only required annual verification.

Caring for Incapacitated child annuitant age 14 or over,



the Survivor Benefit Plan-Marital Status Update is the only required annual verification.

Child annuitant age 18-22 (and not documented as incapacitated), the School Certification/Previous Attendance Letter is your only required annual verification.



Receiving a check in the mail outside the U.S.A. and **do not need to submit a School Certification or a Survivor Benefit Plan-Marriage Status Update**, the Foreign Address Update for Mailed Check is your only required annual verification.



Child annuitant age 14-17 (and not documented as incapacitated), the Survivor Benefit Plan-Marital Status Update is your only required annual verification.



⇒ **See Page 2 for details**

SBP = Department of Defense (DoD) Survivor Benefit Plan
DFAS = Defense Finance and Accounting Service; the DoD agency that processes Survivor Benefit Plan (SBP) payments



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New, Simpler Requirements

New Requirements:

Spouse and Former Spouse SBP Annuitants

(Includes spouse/former spouse annuitants documented as incapacitated)



Spouse and former spouse annuitants **under the age of 55 = Survivor Benefit Plan-Marital Status Update (SBP-MSU) due annually** the first day of the month of their birthday.



Spouse and former spouse annuitants age 55 and **over receiving a check** in the mail outside the U.S.= **Foreign Address Update for Mailed Checks (FAUMC) letter due annually** the first day of the month of their birthday.

New Requirements:

Child SBP Annuitants Under Age 18



Child SBP Annuitants age 14 and over = **Survivor Benefit Plan-Marital Status Update (SBP-MSU) due annually** the first of the month of their birthday.



Child SBP Annuitants under 14 receiving a paycheck in the mail to a foreign address = **Foreign Address Update for Mailed Checks (FAUMC) letter due annually** the first day of the month of their birthday.

New Requirements:

Child SBP Annuitants Documented as Incapacitated



Child SBP Annuitants Documented as Incapacitated **age 14 and over = Survivor Benefit Plan-Marital Status Update (SBP-MSU) due annually** the first day of the month of their birthday.



Child SBP Annuitants Documented as Incapacitated **under age 14 and receiving a paycheck in the mail to a foreign address = Foreign Address Update for Mailed Checks (FAUMC) letter due annually** the first day of the month of their birthday.

Requirements:

Child SBP Annuitants Ages 18-22

(School Certification Requirements Did Not Change)



Student Child SBP Annuitants **turning 18 = School Certification and Direct Deposit forms due once** (the first day of the month of their 18th birthday).



Student Child SBP Annuitants ages **18-22 = School Certification/Previous Attendance Letter due annually** the first day of the last month of their school year.

Notes:

- *Survivor Benefit Plan (SBP) annuitants need to verify their continued eligibility regularly to continue to receive SBP annuity payments. There are several types of verification. The requirements depend on the SBP annuitant's age and relationship to the military service member.*
- *As of August of 2023, SBP annuitants who owe an annual eligibility verification will only owe **one annual eligibility verification each year**. Prior to this change, some SBP annuitants needed to complete multiple forms each year.*
- *The names of the verification documents (except for School Certifications) changed starting August 2023.*
- *DFAS will accept the old version of verification documents through 2024.*
- *"Child" SBP annuitant refers to the annuitant's relationship to the service member, not the child's age.*
- *If the annuitant is documented as incapacitated or is a minor child, the legal representative must sign and submit the verification.*

Helpful DFAS Webpages for SBP Annuitants

Manage Your SBP Annuity

<https://www.dfas.mil/managesbp>

School Certifications

<https://www.dfas.mil/schoolcerts>

Quick Tools

<https://www.dfas.mil/raquicktools>

DFAS Facebook

www.facebook.com/DFASOfficial

myPay

<https://mypay.dfas.mil>

