Survivor Benefit Plan
Annuitant Eligibility Verification 2023
Quick Reference

What Happens in 2023

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

DFAS is simplifying the eligibility verification process for SBP annuitants beginning 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 Beginning 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.

- **Child** annuitant age 18-22 (and not documented as incapacitated), the **School Certification/Previous Attendance Letter** 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.

- **Caring for Incapacitated child** annuitant age 14 or over, the **Survivor Benefit Plan-Marital Status Update** is the only required annual verification.

- **Receiving a check in the mail outside the United States** 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.

⇒ **See Page 2 for details**
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New, Simpler Requirements Beginning August 2023

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 day 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.
- Beginning 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 the 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/raqicktools

DFAS Facebook
www.facebook.com/DFASOfficial

myPay
https://mypay.dfas.mil

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