

SBP School Certification Checklist

What You Need to Know

The Survivor Benefit Plan provides an ongoing monthly annuity payment to military spouses or children when a military member dies while on active duty, on inactive duty or after retirement (if the retiree chooses to purchase coverage). A child's eligibility to continue receiving SBP payments ends when the child turns 18 unless proven to be in school full-time or incapacitated/incapable of self-support.

If a child annuitant attends school full-time (in high school or at an accredited college or university), the SBP annuity payments can continue until they reach age 22 or otherwise become ineligible. SBP child annuitants between 18 and 22 years old must regularly certify their status as an unmarried, full-time student to continue to receive annuity payments.

In 2020, we made sweeping changes to the **annual School Certification process** to simplify it. The current process requires two documents each year:

(1) The **DD Form 2788 plus** (2) the **pre-filled Previous Attendance Letter**.

What You Need to Do

College Students Over 18 Attending School Full-Time - see below

High School Students Over 18 Graduating - see Page 2

High School Students and College Students Turning 18 - see Page 2

What You Need to Do

College Students and High School Students Over 18 Currently Attending School Full-Time:

About 60 days prior to the end date of your school year based on info you previously provided, we will mail you a School Certification package containing a blank DD Form 2788 School Certification and a pre-filled Child Annuitant's Certification for Previous Attendance Letter. The Previous Attendance Letter will be pre-filled with the information you provided previously, so you can easily confirm and sign.

The DD Form 2788 is intended for you to fill out **BEFORE the end** of your current school year. "Section III-Future Intent to Attend or Continue to Attend School on a Full-Time Basis" refers to the **upcoming** school year.

Fill out the DD Form 2788. You can fill in the PDF using this checklist or download our easy DD Form 2788 **Form Wizard** (see <https://www.dfas.mil/schoolcerts>) which also lets you **electronically sign** the form! For school year dates, use the school's official academic calendar dates.

You are required to return a **signed Previous Attendance Letter**, so you **don't** need to fill in Section II of the DD Form 2788. This letter replaces the former requirement for a school official's signature or transcript.

The school certification form (DD Form 2788 dated May 2020) is valid for the **entire upcoming school year, unless** you drop below full-time attendance, graduate, or get married. Use the ending date of the last semester you plan to attend (within the next year) in Section III-Future Intent. For example, if you plan to attend through spring of 2025, use the last date of that semester (e.g., 05/30/2025). If you plan to attend through summer of 2025, use the last date of that semester (e.g., 07/25/2025).

Review the pre-filled Child Annuitant's Certification for **Previous Attendance Letter**. If the information is correct, **sign, date, and fill in your email and phone number**. If it is not correct, please see the instructions on the letter.

Upload a PDF of your completed/signed DD Form 2788 (or Form Wizard generated form), Previous Attendance Letter and any supporting documents (see pg. 3) via the askDFAS **online upload tool** on DFAS.mil: <https://www.dfas.mil/askDFAS>. **OR** mail or fax to DFAS (see pg. 5).

⇒ **Go to <https://www.dfas.mil/schoolcerts> to download the Form Wizard OR go to page 3 to use the checklist** for filling out your DD Form 2788.

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What You Need to Do

High School Students Over 18 Graduating:

About 60 days prior to the ending date of the school year that you previously provided to us, we will mail you a School Certification package containing a blank DD Form 2788 and a pre-filled Child Annuitant's Certification for Previous Attendance Letter. The Previous Attendance Letter will be pre-filled with the information you provided previously, so you can easily confirm and sign.

The DD Form 2788 is intended for you to fill out **BEFORE the end** of your current school year. "Section III - Future Intent to Attend or Continue to Attend School on a Full-Time Basis" refers to the **upcoming** school year.

- Fill out the DD Form 2788.** You can fill in the PDF using this checklist or download our easy DD Form 2788 **Form Wizard** (see <https://www.dfas.mil/schoolcerts>) which also lets you electronically sign the form! For school year dates, use the school's official academic calendar dates.

You are required to return a **signed Previous Attendance Letter**, so you **don't** need to fill in Section II of the DD Form 2788. This letter replaces the former requirement for a school official's signature or transcript.

The school certification form (DD Form 2788) is valid for the **entire upcoming school year**, unless you drop below full-time attendance, graduate, or get married. Use the ending date of the last semester you plan to attend in the next year in Section III. For example, if you plan to attend through spring of 2025, use the last date of that semester (e.g., 05/30/2025). If you plan to attend through summer of 2025, use the last date of that semester (e.g., 07/25/2025).

- Review** the pre-filled Child Annuitant's Certification for **Previous Attendance Letter**. If the information is correct, **sign, date, and fill in your email and phone number**. If it is not correct, please see the instructions on the letter.
 - Upload a PDF** of your completed/signed DD Form 2788 (or Form Wizard generated form), Previous Attendance Letter and any supporting documents (see pg. 3) via the askDFAS **online upload tool** on DFAS.mil: <https://www.dfas.mil/askDFAS> **OR** mail or fax to DFAS (see pg. 5)
- ⇒ **Go to <https://www.dfas.mil/schoolcerts> to download the Form Wizard OR go to page 3 to use the checklist** for filling out your DD 2788.

High School Students and College Students Turning 18:

About 60-90 days prior to your 18th birthday, we will **mail** you a blank **DD Form 2788** and a **direct deposit form**. *You do NOT need to provide a Previous Attendance Letter.*

- Fill out the DD Form 2788 and direct deposit form.** You can fill in the DD 2788 PDF using this checklist or download our easy DD Form 2788 **Form Wizard** (see <https://www.dfas.mil/schoolcerts>) which also has an electronic signature option! Your parent or legal representative must sign the form if you are not yet 18 or the legal majority age in your state.

For school year dates, use the school's official academic calendar dates. The school certification form is valid for the **entire upcoming school year**, unless you drop below full-time attendance, graduate, or get married. Use the ending date of the last semester you plan to attend (during the upcoming school year) in Section III. For example, if you are approaching your senior year in high school, put your graduation date next year. If you are in college, use the ending date of the last semester you plan to attend in the next school year (e.g., the ending date of spring semester next year).

- Upload a PDF** of your completed/signed DD Form 2788 (or Form Wizard generated form), direct deposit form and any supporting documents via the askDFAS **online upload tool** on DFAS.mil: <https://www.dfas.mil/askDFAS> **OR** mail or fax to DFAS (see pg. 5).
- ⇒ **Go to <https://www.dfas.mil/schoolcerts> to download the Form Wizard OR go to page 3 to use the checklist** for filling out your DD Form 2788.

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Quick Tips

1. To avoid delays, make sure your form is:
 - ✓ **Signed and dated by you (or your parent or legal guardian/representative if you are not yet 18 or the legal majority age in your state).**
2. **No school official signature** or transcript is required. The **Previous Attendance Letter** takes the place of this former requirement.
3. The **DD Form 2788 School Certification** is valid for the **entire school year**, unless you drop below full-time attendance, graduate, or get married.
4. For school year dates, use the school's official academic calendar dates.
5. See our School Certifications webpage if you have additional questions:
<https://www.dfas.mil/schoolcerts>

Supporting Documents Required

- Child Annuitant's Certification for Previous Attendance Letter, *unless submitting a School Certification for the first time.*
- Marriage certificate, if the annuitant has married.
- Direct Deposit form, if the student annuitant is turning 18.

Filling out the DD Form 2788

Section I: Identification Information. To be completed by the annuitant student.
(If legal representative is filling out, put annuitant's information where it says "you" or "your")

- 1. Enter the deceased military member's social security number or DOD ID number.
- 2. Enter the deceased military member's name (Last, First, Middle).
- 3. Enter your social security number or DOD ID number.
- 4. Enter your name (Last, First, Middle).
- 5/6. If you are under age 18, enter the name and address of your parent or legal representative. If not, leave blank.
- 7. Enter your date of birth.
- 8. Check Yes or No. If yes, enter date of marriage and include copy of marriage certificate.

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Filling out the DD Form 2788 – continued

Section II: Current Annuitant/Student Verification. To be completed by the student annuitant (Complete this section only if you are not required to submit a signed Previous Attendance Letter).

- 1. Answer Yes or No: Are you currently attending school full-time? Please note: The definition of a full-time student is determined by your school.
- 2. If you **are** currently attending school full-time, x the box next to the type of school.
- 3. Enter your **total school hours** per week. If you are in college or a college-equivalent school that uses credit hours, enter your total credit hours per week (e.g., 12). If high school or equivalent, enter number the clock hours you attend classes each week (e.g., 30). If you are in a work-study program, enter the number of hours each week at work and the number of hours each week at school (e.g., 10 and 20).
- 4a and 4b. If you **are currently** attending school full-time, enter a) name of school and b) school address, including zip code.
- 4c and 4d. Enter c) the date the academic school year began or the date you started (e.g. 08/28/2023) and d) the date your school year will end (e.g., 05/24/2024). This should be the end date of the last semester/term you will attend during the school year. Use your school's official academic calendar for dates.
- 5. If you are **not** currently attending school full-time, enter a) the name of the school you attended most recently and b) the date you last attended school (e.g., 3/15/2024). Use your school's official academic calendar for dates. If you dropped below full-time attendance, use the last date you attended school full-time.

Section III: Future Intent to Attend or Continue to Attend School on a Full-Time Basis (All annuitants should complete this section).

- 1. Answer Yes or No or Undecided: After the end of the current school year, do you intend to enroll or continue as a full-time student with less than a 150-day (five-month) break between school years? If you answer **Yes, go to #2a**. If you answer **No or Undecided, go to Section IV**.
- 2a and 2b. Enter the name and address of the school you will attend within the next 150 days.
- 2c and 2d. Enter c) the date the academic school year will begin (e.g. 09/08/2024) and d) the date the school year is expected to end for the semesters you plan to attend. For example: if you plan to attend through spring semester and it ends May 30 of 2025, use 05/30/2025. If you plan to attend through summer of 2025, use the last date of that semester (e.g., 7/25/2025).

Section IV: Your Signature

- Sign your name (parent or legal representative must sign if you are not yet 18 or the legal majority age in your state).
- Enter your email address, daytime telephone number, and the date you sign the form.

-see additional information on next page-

SBP School Certification Checklist

Submitting Your Form

Send your completed, signed, and dated form (keep a copy of your signed form):

Online upload:

Upload a PDF of your completed/signed form(s) and supporting documents via the askDFAS **online upload tool** on DFAS.mil (this link is case-sensitive):

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

Or mail to:

Defense Finance and Accounting Service
U.S. Military Annuitant Pay
8899 E 56th Street
Indianapolis, IN 46249-1300

Or fax to:

800-982-8459

Reminders

- Is your form **signed and dated** by you (or your parent or legal representative if you are not yet 18 or the legal majority age in your state)?
- Is your form complete, including all of the sections applicable to your attendance?
- Is your Previous Attendance Letter signed and dated?
- Is your direct deposit form signed and dated?
- Did you include all documents?
 - ✓ Child Annuitant's Certification for Previous Attendance Letter (*not required if you are turning 18 and providing a School Certification for the first time*)?
 - ✓ Marriage certificate, if you married?
 - ✓ Direct Deposit form, if turning 18?

If You Do Not Receive an Annual School Certification Package in the Mail

- ⇒ If you are over 18, about 60 days prior to the end date of your school year based on info you previously provided, we will mail you an annual School Certification package containing a blank DD Form 2788 School Certification and a pre-filled Child Annuitant's Certification for Previous Attendance Letter (*there is an example of a blank Child Annuitant's Certification for Previous Attendance Letter on our website*).
- ⇒ **If you do NOT receive the School Certification package in the mail, please call our customer care center** at (317) 212-0551 or (800) 321-1080 (Monday-Friday, 8:00 a.m. - 5:00 p.m., Eastern Time), confirm or update your mailing address, and ask for an annual School Cert package to be mailed to you.