

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 or incapacitated/incapable of self-support.

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. These student child annuitants use the DD 2788 (Child Annuitant's School Certification) and the Child Annuitant's Certification for Previous Attendance Letter to verify their eligibility.

In 2020, we made sweeping changes to the school certification process to simplify and reduce the paperwork.

The current process includes: (a) a **new DD Form 2788** (dated May 2020) which can be used for an **entire school year** instead of only one semester, doesn't require a school official's signature, and serves as the student annuitant's annual Certificate of Eligibility and (b) a **new, pre-filled Previous Attendance letter**. We also have a new Form Wizard for the DD 2788 with an electronic signature option; and an online upload tool on DFAS.mil.

Additional info is available on the School Certifications webpage: www.dfas.mil/schoolcerts

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

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

About 60 days prior to the ending date of the school year (or semester) you previously provided, we will mail you a School Certification package containing a cover letter, a blank DD 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 2788 is intended for you to fill out BEFORE the end of your current school year/semester. "Section II-Current Annuitant/Student Verification" refers to the **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 2788. You can fill in the PDF using this checklist or download our easy DD 2788 **Form Wizard** (see 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 don't need to fill in Section II as long as you are returning a signed **Previous Attendance Letter**. This letter replaces the former requirement for a school official's signature or transcript.

The school certification form (DD 2788 form 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 (in the next year) in Section III-Future Intent. For example, if you plan to attend through spring of 2023, use the last date of that semester (e.g., 05/20/2023). If you plan to attend through summer of 2023, use the last date of that semester (e.g., 07/31/2023).

- ☐ 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.
- ☐ Upload a PDF of your completed/signed DD 2788 form (or Form Wizard generated form), Previous Attendance Letter and any supporting documents (see pg. 3) via the AskDFAS **online upload tool** on DFAS.mil (case-sensitive link): <https://go.usa.gov/xymaH>. **OR** mail or fax to DFAS (see pg. 5).

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

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What You Need to Do

High School Students Over 18 Graduating in 2022:

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 cover letter, a blank DD 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 2788 is intended for you to fill out BEFORE the end of your current school year. "Section II - Current Annuitant/Student Verification" refers to the **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 2788. You can fill in the PDF using this checklist or download our easy DD 2788 **Form Wizard** (see 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 don't need to fill in Section II as long as you are returning a **signed Previous Attendance Letter**. This letter replaces the former requirement for a school official's signature or transcript.

The school certification form (DD 2788 form 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 in the next year in Section III. For example, if you plan to attend through spring of 2023, use the last date of that semester (e.g., 05/20/2023). If you plan to attend through summer of 2023, use the last date of that semester (e.g., 07/31/2023).

- ☐ 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.
- ☐ Upload a PDF of your completed/signed DD 2788 form (or Form Wizard generated form), Previous Attendance Letter and any supporting documents (see pg. 3) via the AskDFAS **online upload tool** on DFAS.mil (case-sensitive link): <https://go.usa.gov/xymaH>. **OR** mail or fax to DFAS (see pg. 5)

⇒ **Go to 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 2788** and a direct deposit form.

- ☐ Fill out the DD 2788 and direct deposit form. You can fill in the DD 2788 PDF using this checklist or download our easy DD 2788 **Form Wizard** (see 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 2788 form (or Form Wizard generated form) and any supporting documents via the AskDFAS **online upload tool** on DFAS.mil (case-sensitive link): <https://go.usa.gov/xymaH>. **OR** mail or fax to DFAS (see pg. 5).

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

SBP School Certification Checklist

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 2788 school certification form** 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 questions: www.dfas.mil/schoolcerts

Supporting Documents Required

- Child Annuitant's Certification for Previous Attendance Letter, if needed.
- Marriage certificate, if the annuitant has married.
- Direct Deposit form, if the student annuitant is turning 18.

Filling out the DD 2788 Form

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.

-continued on next page-

SBP School Certification Checklist

Filling out the DD 2788 Form – continued

Section II: Current Annuitant/Student Verification. To be completed by the student annuitant (IF *not* submitting 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 (e.g. 09/03/2021) and d) the date the school year will end (e.g., 05/19/2022). 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., 12/12/2021). 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 student 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. 09/08/2022) 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 20 of 2023, use 05/20/2023. If you plan to attend through summer of 2023, use the last date of that semester (e.g., 7/31/2023).

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 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://go.usa.gov/xymaH>

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?
- ☐ Did you include supporting documents?
 - ✓ Child Annuitant's Certification for Previous Attendance Letter, if needed
 - ✓ Marriage certificate, if you married?
 - ✓ Direct Deposit form, if turning 18?