

Simplifying Eligibility Verifications for SBP Annuitants

By DFAS Cleveland

Beginning August 2023, the Defense Finance and Accounting Service (DFAS) reduced the eligibility verification requirements for Survivor Benefit Plan annuitants to **one annual** verification. Previously, some SBP annuitants needed to complete multiple forms each year. Now, **SBP annuitants will only need to complete and submit one annual verification each year.**

In addition, there are two new annual eligibility verification documents with names that identify their purpose. And their due dates are easy to remember: they are due the first day of the month of the annuitant's birthday.

The Types of Annual Annuitant Eligibility Verifications

There are now three types of annual verifications for SBP annuitants:

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. It is due the first day of the month of the annuitant's birthday. This replaces the old Certificate of Eligibility (COE).

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 an SBP-MSU. It is due the first day of the month of the annuitant's birthday. This replaces the old Report of Existence (ROE).

School Certification

The DD Form 2788 Child Annuitant's School Certification and the Child Annuitant's Certification for Previous Attendance Letter are required annually for child annuitants ages 18-22 to confirm full-time school attendance and marital status. School certification is due the first day of the month the annuitant's school year ends.

The School Certification requirements did not change, however now SBP annuitants who are currently required to submit a School Certification/Previous Attendance Letter won't need to complete any of the other annual verification documents. No more annual Certificate of Eligibility (COE), no more twice-a-year Report of Existence (ROE).

New Online Upload Tools for Eligibility Verifications

We also have convenient online upload tools on our website for returning the eligibility verification documents. Once you complete and sign your document, save it as a PDF file and upload it online at askDFAS. Find out more here: <https://www.dfas.mil/askdfas>

Please note that we will still accept and process annuitant COEs or ROEs in place of the new verifications during the period of the transition from the old process to the new, simpler process. Download the verification documents from our website Forms Library here (<https://www.dfas.mil/raforms>).

Summary of New, Simpler Annual Requirements for SBP Annuitants

- If you are a **child annuitant aged 18-22** (not documented as incapacitated), the School Certification/Previous Attendance Letter is the only annual verification you need to submit.
- If you are a **child annuitant aged 14-17** (not documented as incapacitated), the Survivor Benefit Plan-Marital Status Update is the only annual verification you need to submit.
- If you are caring for an **incapacitated child annuitant aged 14 or over**, the Survivor Benefit Plan-Marital Status Update is the only annual verification you need to submit.
- If you are a **spouse/former spouse annuitant under the age of 55**, the Survivor Benefit Plan-Marital Status Update is the only annual verification you need to submit.
- If you are 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 the only annual verification you need to submit.

Find Out More

Learn more about the simpler annual eligibility verifications for SBP annuitants or about managing an SBP annuity pay account at:

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