

DFAS HELPFUL TIPS & TOOLS FOR SBP ANNUITANTS

Manage Your SBP Annuity with myPay

The quickest and most convenient way to manage your SBP annuity pay is with **myPay**. **If you are receiving SBP annuity pay** through DFAS, you can use myPay.

myPay provides convenient access to your Annuitant Account Statement, and lets you easily update your contact information or your federal tax withholding or download your tax documents.

Also, if you set up your myPay profile with an **email address**, you can receive emailed information from DFAS and from your loved one's branch of service.

myPay is available using the internet from your computer or your mobile device browser at: <https://mypay.dfas.mil>

Eligibility Verification

SBP annuitants need to verify their continued eligibility regularly to receive SBP annuity payments. The requirements depend on the SBP annuitant's age and relationship to the military service member.

Great News! **We simplified the annual eligibility verifications for annuitants.** Now, SBP annuitants will only need to complete and submit one of the annual verifications each year. See an overview of the simpler requirements on the "Manage Your SBP Annuity," webpage. You can download the DFAS New Simpler Eligibility Verification Requirements for SBP Annuitants 2023 Fact Sheet or **download our new Quick Reference Guide.**

Find out more: www.dfas.mil/managesbp

Tax Statements

We have easy, convenient options to get a copy of your **1099-R** tax document without having to call.

Your 1099-R is available much earlier and more securely in **myPay** than those sent to customers who choose delivery by mail.

Even if you are not a myPay user, you can get a copy of your 1099-R sent to your mailing address on record or to a one-time, temporary mailing address by **submitting your request online.**

If you prefer traditional mail, you can send us a written request by mail (or fax), but please make sure you leave ample time for processing and for mail delivery.

Find out more: www.dfas.mil/managesbp

School Certifications

*(Child annuitants over age 18
attending school full-time)*

We have helpful tools and tips for filling out the school certification documents.

The School Certification DD 2788 **Form Wizard** asks a series of questions and fills in your answers in the appropriate areas of the form, and you can sign it electronically. Your School Certification DD 2788 Form will **now serve as your Certificate of Eligibility (COE)** instead of requiring a separate COE each year.

The **How-To Checklist** provides quick tips and a walk-through of the form to help you fill it out correctly and easily.

Upload a PDF of your completed and signed form and supporting documents via the **AskDFAS online upload tool** on DFAS.mil.

Find out more: www.dfas.mil/schoolcerts

Form Wizards

We are developing new form tools to make the process of completing a form easier for you.

Our **Form Wizards “take the form out of the form”** by walking you through the information needed to help ensure that all necessary fields are completed properly.

Find out more: www.dfas.mil/raquicktools

askDFAS Online Upload Tools

Our user-friendly **online upload tools** to allow you to **submit forms and requests faster and easier**. Many forms and documents can now be submitted in PDF via the askDFAS online upload tools from your home computer or mobile device.

Find out more: www.dfas.mil/askdfas

Status Notifications

We are rolling out more and more **status notifications to keep you informed** as forms or documents you submit move through the annuity pay processing cycle.

To receive status notifications for mail and fax submissions, please ensure your email address is available and updated in myPay.

Quick Tools Webpage

Our new **Quick Tools webpage is a one-stop-shop for our most-requested tools**. The webpage is organized by customer, with tools specifically for survivors and SBP annuitants.

Find it here: www.dfas.mil/raquicktools

Helpful Webpages for Annuitants

Quick Tools:

www.dfas.mil/raquicktools

Manage Your SBP Annuity:

www.dfas.mil/managesbp

School Certifications:

www.dfas.mil/schoolcerts

Forms:

www.dfas.mil/raforms

Retiree/Annuitant Customer Service:

www.dfas.mil/raservice

askDFAS FAQs and Upload Tools:

www.dfas.mil/askdfas

DFAS Facebook:

www.facebook.com/dfasofficial

myPay:

mypay.dfas.mil

**Look for our new twice-yearly
DFAS Survivor SBP Newsletter at**
www.dfas.mil/survivornews