

Survivor's Benefit Plan (SBP) Process: Determining eligibility and assisting the Survivor to receive SBP monthly annuity

No.	Activity/Decision Point Name	Description	Regulations and Supporting Resources	Documents and Forms	Systems	Notes
1	Eligible for SBP?	Beneficiary(ies) of a Soldier who dies while on active duty or a deceased Retired Soldier may be eligible for SBP which provides an immediate monthly annuity. There are six beneficiary election options: 1. Spouse 2. Spouse and child 3. Child only 4. Former spouse 5. Former spouse and child 6. Insurable interest				Dependents include: spouse, son, daughter, adopted children, and/or stepchildren.
2	Casualty or retired?	If a Soldier dies while on active duty, the beneficiary(ies) receives assistance from a Casualty Assistance Officer (CAO) in the SBP application process. If the Soldier dies while on retirement, the beneficiary(ies) does not receive assistance from a CAO.				
3	Assist beneficiary(ies) in application process	CAO assists the beneficiary(ies) in SBP application process. This includes assisting beneficiary(ies) in completing the SBP Beneficiary Worksheet and the Counseling Checklist.	Office of the Secretary of Defense Military Compensation Website	Survivor Benefit's Plan Beneficiary Worksheet Survivor Benefit's Plan Counseling Checklist		

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4	Schedule appointment with Retirement Services Officer (RSO)	CAO contacts the RSO to schedule an appointment for beneficiary(ies).	Army Casualty Notification and Assistance Guide Survivor Benefits Plan Smart Book			In most cases, the RSO appointment is held at the nearest Installation.
5	Accompany beneficiary(ies) to RSO appointment	CAO accompanies beneficiary(ies) to the Installation RSO appointment. RSO briefs the beneficiary(ies) on the final calculation of the benefits.				In most cases, the RSO appointment is held at the nearest Installation.
6	Schedule appointment with RSO	Beneficiary(ies) contacts the RSO to schedule an appointment.				In most cases, the RSO appointment is held at the nearest Installation.
7	Attend RSO appointment	Beneficiary(ies) attends RSO appointment.				In most cases, the RSO appointment is held at the nearest Installation.