



# Instructions for Reporting the Death of an Annuitant or Survivor

This online tool is used to report the death of a retiree or survivor annuitant who is currently receiving a benefit from OPM under the Civil Service Retirement System (CSRS) or the Federal Employees Retirement System (FERS).

## Instructions for Completing Application

Please enter the information in each section and press the Submit Form button. Form fields which are required are identified with the red asterisk and the word required (**\*Required**), or with the message "This field is required."

### Section A - Annuitant Information

Enter the claim number of the deceased, including the prefix. Refer to your retirement booklet, retirement identification card, or any correspondence received from Retirement Services for more information.

### Section B - Deceased Information

Identify the deceased annuitant or survivor, including last four digits of the social security number, date of birth and date of death.

### Section C - Surviving Spouse

To qualify as a **surviving spouse** of a deceased annuitant, the individual must be married to the annuitant at the time of the annuitant's death. If the marriage occurred **before** retirement then you must meet the following requirement.

1. The annuitant elected a survivor benefit payable to the spouse and the survivor reduction was withheld from the annuity payment.

If the marriage occurred after retirement then you must meet one of the following requirements to qualify as a surviving spouse:

1. The surviving spouse and the annuitant must have been married for at least 9 months. Count the aggregate time of all marriages between the spouse and the annuitant to determine the total length of marriage; or
2. A child was born of the marriage. For this purpose, child includes:
  - a. A child born posthumously to the deceased annuitant and spouse;
  - b. A child born to the deceased annuitant and spouse before they were married; and
  - c. A child of a prior marriage between the deceased annuitant and spouse.
    - i. **NOTE:** An adopted child is not a child born of the marriage.
3. The death of the annuitant was accidental. See *5 CFR 831.642(d)*.

### Section D - Surviving Children

1. A **child minor** is a son or daughter who is unmarried and:
  - a. was under age 18 at the time of the deceased

person's death, including any:

- i. adopted child, and/or
- ii. stepchild, and/or
- iii. recognized child born out-of-wedlock who lived with the deceased in a regular parent-child relationship, and/or
- iv. recognized child born out-of-wedlock if there was a judicial determination of support or if the deceased made regular and substantial contributions for the support of the child.

2. A **child disabled** is a son or daughter who:

- a. is age 18 or older and unmarried, but who became mentally and/or physically disabled before age 18 and who, because of the disability, is incapable of self-support.
- b. OPM must be provided with information from the disabled child's parent or guardian about the child's education, any employment, and residence.
- c. In addition, the child's doctor must provide information about the child's medical condition. Form [RI 25-43, Documentation in Support of Claim for CSRS or FERS Benefits as Disabled Dependent Child](#), outlines the specific information needed.

3. A **child student** is a son or daughter who:

- a. is between ages 18 and 22, unmarried, and a full-time student in an educational institution.
- b. A recognized educational institution is a school that is accredited, has a faculty, and requires study or training to be done at the school. Included are:
  - i. High schools;
  - ii. Trade schools;
  - iii. Technical or vocational institutes;
  - iv. Business schools;
  - v. Junior colleges; and
  - vi. Colleges, universities, or comparably recognized educational institutions.
- c. OPM will request certification of the child's school attendance from the child's payee and the appropriate school official. OPM will determine the child's eligibility for benefits after receipt of the certification form, [RI 25-41, Initial Certification of Full-Time School Attendance](#).

### Section E - Informant Information

In this section, enter information about the person reporting the death, including name, address, telephone numbers, email address, and relationship to the deceased annuitant. Instructions can be added to the text field, but do not add any additional personally identifiable information.