

# PACRA – Survivor Information and Benefit Guidelines

**Step 1:** The survivor of a PACRA member should report the death to Palomar College by calling Lucy Nelson at 760.744.1150, Ext. 2889. Lucy will answer any questions you have about the deceased's Health Benefits. She will also notify the President's Office, who will in turn, notify the college staff.

**Step 2: State Teachers Retirement System (STRS) Members:** Follow the instructions below:

## Reporting the Death of a Member or Benefit Recipient

CalSTRS should be notified at **(800) 228-5453** as soon as possible of the death of:

- A member
- An option beneficiary
- Any payee receiving CalSTRS benefits

CalSTRS will need the following information:

- Deceased person's name and Social Security number or CalSTRS Client Identification Number
- Date of death
- Individual's status immediately preceding death:
  - Retired
  - Disabled
  - A member in active teaching status
  - Option beneficiary recipient
- Name, address and telephone number of contact person

## Survivor Benefit Application Processing

A caseworker will contact the recipient to complete the application for survivor benefits by written correspondence. The contact information of the caseworker will also be provided.

A copy of the death certificate must be sent to CalSTRS. Additional information or documentation may be requested.

CalSTRS payments issued to the deceased after the date of death must be returned to CalSTRS or may be deducted from subsequent benefits paid.

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**Step 2: Public Employees Retirement System (PERS) Members:** Follow the instructions below:

When a PERS annuitant dies, there are several important steps a spouse or family member can take to assure prompt payment of any PERS benefits due.

- **The first step** is to notify PERS by phone or mail:  
P.O. Box 942711  
Sacramento, CA 94229-2711  
(916) 326-2323

The following information is needed:

1. Name, Social Security number and PERS retirement number of the deceased annuitant.
  2. The date of death.
  3. Name and address of person providing notice of death.
  4. Name and address of surviving spouse, other next of kin or the person who will be settling the estate.
- **The Second step** is to gather necessary documents. The system will ask for:
    1. A certified copy of the death certificate.
    2. A newspaper clipping reporting the death (if available).
    3. Letters of administration from the executor of the estate, if the annuitant's estate is to be paid any death benefits.
    4. Other documents which are needed but not included in the members file, such as marriage certificates or birth certificates.
  - **The third step** is completing forms and returning to PERS. The following forms are completed as the last step in determining eligible payees:

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### **Payment of Benefits**

CalSTRS generally pays survivor benefits to recipients within 45 days of the receipt of the last required document.

Payment may be delayed if documentation, such as the following, is missing or not received in a timely manner:

- Marriage certificates
- Death certificates
- Declaration of domestic partnership
- One-Time Death Benefit Designation form with addresses of the recipient or recipients

### **Important Telephone Numbers**

- **State Teachers Retirement Service (STRS)**  
1-800-228-5453
- **Public Employees Retirement System (PERS)**  
1-800-225-7377
- **Delta Dental**
- 1-866-499-3001

### **Survivor Information Questionnaire/Claimant Statement.**

The information provided by this form is used to determine whether any event has occurred to invalidate the member's beneficiary designation or to identify persons who might be beneficiaries by law. It also serves as the formal application to receive payment of death or survivor benefits determined to be payable to PERS. The person completing this form is certifying that he/she is the beneficiary.

#### **General Information.**

All retirement warrants dated after an annuitant's death should be promptly returned to the system. If warrants have been mailed to a bank for direct deposit to the annuitant's account, a check for the full amount of warrants issued after the annuitant's death should be sent to PERS.

Any allowance accrued but unpaid as of the annuitant's death will be paid to the eligible beneficiary.

We suggest that individual readers save this page and place it with their retirement records to provide information and guidance to survivors or beneficiaries so they can receive prompt payment of any PERS death benefit

We also recommend that individuals maintain a record on Social Security or any other retirement systems which may pay benefits upon death to insure that no benefits are overlooked.

Questions should be addressed to the PERS Benefits Division at:

P.O. Box 942711  
Sacramento, CA 94229-2711