

# Survivor Checklist

The following information is to assist surviving spouses and dependents of deceased County employees

## Employee Assistance Program

The Employee Assistance Program is a counseling/referral service, adopted to provide private and confidential help to employees and family members under emotional stress for the death of a loved one, or having financial and/or legal difficulties. Call Aetna Resources for Living at (800) 221-0945 for help, available 24 hours a day. When calling, identify your relationship with the County employee.

## Death Certificate

You will need at least one "certified" copy of the death certificate, probably more. It is usually necessary to provide certified copies with claims filed, and the employee may be eligible for many different types of benefits. If the death occurred in Orange County, copies of the death certificate may be obtained from the Orange County Birth and Death Registration (714) 480-6700. The address is 200 W. Santa Ana Blvd., Suite 100-B, Santa Ana, CA 92701.

Approximately six weeks after the date of death, copies are available from the [County Clerk Recorder's Office](#). For recorded information, call (714) 834-2500. The Recorder's Office is located at 601 N. Ross Street, Santa Ana, CA, 92701.

## Health Insurance

Call the Benefits Service Center toll-free at 1-833-476-2347 for information about continuation of health insurance and any other benefits through the County of Orange. You will need the social security number of the deceased employee to access information about their benefits.

## Other Insurance

Lodges, credit unions, service clubs, labor unions and professional associations may offer benefits to members, often including life insurance, dental plans, etc. The following are the unions and associations representing most County employees:

[American Federation of State, County and Municipal Employees](#)

(714) 778-4417

[Association of Orange County Deputy Sheriffs](#)

(714) 285-2800

[International Union of Operating Engineers, \(AFL-CIO\)](#)

(213) 385-1561

[Orange County Attorneys Association](#)

(714) 953-6262

[Orange County Employees Association](#)

(714) 835-3355

[Orange County Managers Association](#)

(714) 953-6262

[Teamsters Union, Local 952](#)

(714) 740-6200

### **Credit Union**

Contact the [Orange County Federal Credit Union](#) (888) 354-6228 regarding accounts and/or outstanding balances. The Credit Union will need a copy of the death certificate, and signatures of the surviving spouse or other beneficiaries may be required. Also inquire about possible insurance on accounts and/or loans.

### **Employment/Payroll**

Contact the department where the deceased was employed. The employee's supervisor should be notified and arrangements made to pick up any personal belongings. The Human Resource Services departments of the major County agencies are listed below.

## [Agency Human Resource Services Departments](#)

For Department specific contact information, click the above link.

Call the [Auditor-Controller's Office](#) (714) 834-2450, 1770 N. Broadway, Santa Ana, CA 92706 to arrange for obtaining and cashing any paychecks due the employee. Also inquire about possible vacation, compensatory, and sick leave balances.

### **Retirement**

Call the [Orange County Employees Retirement System](#) (714) 558-6200 to arrange for any cash payment or retirement due. A copy of the death certificate will be needed and the beneficiary must sign necessary forms. A marriage certificate may be required, if applicable. The Retirement Office is located at 2223 Wellington Avenue Suite #100, Santa Ana, 92701.

### **Defined Contribution Program**

To inquire about possible defined contribution plans, call Empower Retirement at: (866) 457-2254. You will need to provide the social security number of the deceased employee to access account information.

### **Health Reimbursement Arrangement Program**

If the deceased employee was in a bargaining unit represented by AOCDS or OCAA, please contact Employee Benefits at (714) 834-6282 to determine if the deceased employee had an HRA account and to obtain the Employer Plan Number. Then, contact MissionSquare Retirement at (800) 669-7400 to establish a survivor account which may be used to pay for qualified medical expenses for the surviving family members. Please note that you will need the social security number of the deceased employee along with a copy of the death certificate to establish a survivor account.

### **Social Security**

Call the [Social Security Administration](#) nearest to your home, or (800) 772-1213, to determine if there are any Social Security benefits available.

### **Other**

If the total estate, including life insurance, is worth over \$600,000, consult your tax advisor or the [State Controller](#), Division of Tax Administration at (916) 445-8717, for information regarding inheritance taxes and release of bank accounts, etc. The address is P.O. Box 942850, Sacramento, CA, 94250-5873.

Contact the [County of Orange Veterans Service Office](#) at (714) 480-6555 regarding veteran's benefits, if applicable. This office is located at 1300 South Grand, Building B, Santa Ana, CA 92705

Also contact past employers of the deceased about possible remaining or deferred benefits. Check for death benefits attached to mortgages, loans, time payments or other credit contracts.