
Contact The UTLA Membership Office

Survivors can contact UTLA at 213/487-5560 and ask for the Membership Office. That office will check membership records to determine if there are any benefits due the family.

Contact The Credit Union

There are two credit unions that UTLA members commonly use. They should be contacted to see if the decedent had any open accounts.

California Credit Union

420 N. Rosenell Terrance
Los Angeles, CA 90026-4996
213/484-0127 or 800/334-8788

First Financial Federal Credit Union

POB 1110
West Covina, CA 91790
800/537-8491

Beneficiaries May Be Different

It is important to note that the various agencies can only pay benefits to the last beneficiary designated by the employee. These designations may be made at various times through the employee's career and may be different for each benefit. It is very important that employees take the time to review their beneficiary information so that it reflects their current wishes.

If The Death Was Work Related

If an active employee's death was work related, contact the firm listed below.

Gordon, Edelstein, Krepack, Grant, Felton and Goldstein

The Paramount Plaza, Suite 1800
3580 Wilshire Blvd.
Los Angeles, CA 90010
213/739-7000 or 213/487-1520

Plan An Appropriate Remembrance

How teachers and support personnel are remembered varies widely from site to site and from person to person. Some sites involve faculty, students, community, and the deceased's family to plan appropriate memorials. Others pretty much ignore the whole thing.

All teachers and support staff members play a vital part in the development of students and deserve to be remembered. An appropriate memorial not only honors the person it provides an opportunity for those whose lives were touched to say goodbye. Whether it's a memorial service, a scholarship, tree, book, or some other item, it can be a learning experience teaching students valuable lessons about dealing with death and showing respect for the contributions people make in their lives.

Contact the UTLA Communications Department by email at webmaster@utla.net or by fax to 213/487-3319 to put a memorial notice in the *UNITED TEACHER*.

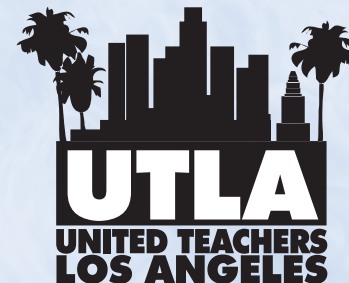


*Over a Quarter Century of
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3303 Wilshire Blvd., Tenth Floor,
Los Angeles CA 90010
(213) 487-5560 or (800) 556-UTLA

What To Do When A Member Dies

Revised April 2008



If you were to die, would your survivors know what to do to get your benefits? If a co-worker dies, would you be able to help guide the family through the process? Here is what you need to know.

Whom the Beneficiary Must Notify

The surviving beneficiaries need to notify two agencies:

California State Teachers Retirement System (CalSTRS) or California Public Employees Retirement System (CalPERS)
LAUSD Benefits Administration

Each agency requires a certified copy of the death certificate, in addition to the deceased employee's name, Social Security Number, and LAUSD employee number; whether the person was on active teaching status, retired, disabled or a beneficiary under the option selection; date of death; and name, address and telephone number of a contact person. It is recommended that the family request at least six certified copies of the death certificate.

A Beneficiary Information Questionnaire will be sent to the contact person within five days of the date CalSTRS receives notice of death. The questionnaire serves as an official acknowledgement of receipt of notification. When the completed questionnaire is returned to CalSTRS, it provides them with the most current information on the decedent's family and estate. The information is necessary to identify the eligible beneficiaries for various benefits. Most applications for survivor benefits can be taken over the phone. CalSTRS usually pays survivor benefits within 45 days of receiving the last required document. However, payment can be delayed if documentation (such as a marriage license or death certificate) is not received in a timely manner, or because of the absence of a valid beneficiary designation form on file with a current beneficiary address.

CalSTRS and CalPERS

The California State Teachers Retirement System provides benefits in accordance with established procedures as designated on the member's beneficiary statement. These benefits could include a lump sum death benefit and either survivor benefits or retirement benefits, according to the circumstances. A few certificated employees have been members of the California Public Employees Retirement System and may have remained in PERS when they became certificated. This usually is when the employee's first paid status with LAUSD was as a classified employee. In that event, CalPERS should be the retirement system that is notified. The processing for either system requires about three to five months. The addresses for the two systems are:

California State Teachers Retirement System
Claims Section, Member Services Division
POB 15275-C, Sacramento, CA 95851
800/228-5453 www.calstrs.com

California Public Employees Retirement System
POB 94211, Sacramento, CA 94229-2711
888/225-7377 www.calpers.ca.gov

LAUSD Benefits Administration

This office needs to be contacted in order for beneficiaries to receive the proceeds of the \$20,000 life insurance policy provided for each eligible District certificated employee who dies while in active status. Additionally, if the deceased person was covered by an additional group life insurance policy through LAUSD, this office will initiate that process as well.

If the survivor wants to continue health insurance coverage as an individual, LAUSD can advise on COBRA Continuation Coverage.

LAUSD Benefits Administration
POB 512298, Los Angeles, CA 90051-0298
213/241-4262; fax 213/241-4247
In person: go to 333 S. Beaudry Ave. LA
Email: benefits@lausd.net

LAUSD Payroll Services

When a certificated employee on active status dies, several actions are implemented. Of particular concern to beneficiaries is that the law requires any warrant for salary due the deceased employee be sent to the Office of the County Superintendent of Schools before distribution to the proper parties. Once approved by the County, the check is returned to LAUSD for distribution to the employee's designated beneficiary. Also, if the decedent was an active employee, it is a good idea to check the voluntary payroll deductions section of their last salary warrant. Any organizations for which a deduction is listed should be contacted, especially since it could be for insurances or 403b plans.

Contact: LAUSD Payroll Services Salary Delivery Unit; 213/241-2921

Los Angeles County Superintendent of Schools
9300 East Imperial Highway
Downey, CA 90242
562/922-6111

Social Security Administration

Most UTLA bargaining unit members do not pay into the Social Security System through LAUSD. However, some employees may have earned qualifying credits either from previous jobs or second jobs. Contact the Social Security Administration to determine eligibility for benefits: 800/772-1213.

Veterans Administration

If the deceased served in the U.S. Armed Forces, contact the Regional Office of the Veteran's Administration, 11000 Wilshire Blvd., Los Angeles, CA 90024; 800/827-1000.