
DEATH CLAIMS (RSK-P005)
SCUSD Employee Benefits

1.0 SCOPE:

- 1.1 Procedure by which the District process death claims with and without life insurance, active or retired members.

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

2.0 RESPONSIBILITY:

- 2.1 Employee Benefits Technician

3.0 APPROVAL AUTHORITY:

- 3.1 Director of Risk Management

Signature

Date

4.0 DEFINITIONS:

- 4.1 Life Insurance form – Health Net Life Insurance Form 8821 (10/99)
- 4.2 Beneficiary form – Record of selected beneficiary
- 4.3 Card file – Beneficiary records prior to current beneficiary form
- 4.4 BRMS/VBAS – Benefit Risk Management System
- 4.5 CalPERS – Public Employee Retirement System
- 4.6 CalSTRS – State Teachers Retirement System
- 4.7 DD – Delta Dental
- 4.8 VSP – Vision Service Plan
- 4.9 COBRA – Continuation of Group Health benefit after termination of benefits
- 4.10 ESCAPE – District fiscal and personnel computer system
- 4.11 BMI – Scanning System

5.0 PROCEDURE:

- 5.1 Benefit Technician receives information that a retiree or active employee has died.
- 5.2 Benefit Technician sends a letter to the designated beneficiary, requesting an original death certificate, the beneficiary age, social security number and current address. Technician determines continuation of benefits for any surviving dependents according to bargaining contract through COBRA.
- 5.3 Benefit Technician provides Personnel analyst copy of death certificate for active employee, when received.
- 5.4 Benefit Technician closes active or retiree medical, dental, vision and life benefits in ESCAPE and BRMS/VBAS. Technician advises payroll to close out any other benefits such as 125 plans for active employees.
- 5.5 Benefit Technician enrolls eligible surviving dependent(s) of active employees for continuing benefits through COBRA. Send any options selection to BRMS/VBAS for enrollment. Request appropriate requisitions from Office Technician III to pay for COBRA health and options as describe according to bargaining contracts.

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- 5.6 Benefit Technician enters date of death in the ESCAPE and BRMS/VBAS.
- 5.7 Health Net notifies District by letter of payment on life insurance policy.
- 5.8 Benefit Technician scans documents into BMI. Hardcopies are filed.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Life Insurance form – external form
- 6.2 Beneficiary form – Record of selected beneficiary - external Form

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
Death Claim Paperwork	Scanned	1 year on site	Carrier has original paperwork	Secure Area

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
1/30/04	NC	
11/8/04	A	Revised per audit input to include less work instruction detail
04/07/09	B	Updated changes

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