



February 2023

How to report the death of a Pre-97 retiree with lifetime District benefits to Foothill- De Anza Community College District (FHDA), California Public Employees' Retirement System (CalPERS), California State Teachers Retirement System (CalSTRS)

**IMPORTANT DISCLAIMER:** *This document provides contact options, links to relevant information/forms, and process guidelines as currently given on the websites below. However, some information could at any time be removed or updated; contact FHDA, CalPERS, or CalSTRS with any questions. If you find errors or inaccuracies in this document, please report them to [MyBenefits@fhda.edu](mailto:MyBenefits@fhda.edu).*

### FHDA Surviving Spouse Program (SSP)

SSP is an option to continue health benefits for eligible survivors—spouse, registered domestic partner, dependents—of full-time contract employees hired prior to '97 with lifetime benefits through the district: faculty, classified employees, supervisors, administrators, police officers, confidential employees, and Board Trustees. FHDA strongly recommends you inform them of the retiree's death within 30 days.

[https://hr.fhda.edu/benefits/\\_retirees.html](https://hr.fhda.edu/benefits/_retirees.html)

- Notification options:
  - By email: [MyBenefits@fhda.edu](mailto:MyBenefits@fhda.edu)
  - By phone: (650) 949-6224 / FAX (650) 949-6299
  - By mail: **FHDA District Benefits**  
**12345 El Monte Road**  
**Los Altos Hills, CA. 94022**
  - In-person: visit the District Human Resources Office on the Foothill Campus
- Once notified, HR/MyBenefits will provide you the SSP packet with these four documents (the forms are not available online):
  - SSP Offer Letter- to agree or refuse continuation of benefits;
  - Universal Enrollment Form- to select benefits to continue;
  - ACH form: to authorize monthly deductions from bank account for selected benefits;
  - SSP Benefit Rates: current cost of CalPERS health plans (*the District's current health care provider*) and a separate Dental/Vision plan.Return the completed forms to the address above or email pdfs to [MyBenefits@fhda.edu](mailto:MyBenefits@fhda.edu).
- If you choose to continue a CalPERS health plan through SSP, you are fully responsible for the CalPERS full cost of the health plan (not the District's negotiated monthly contribution that the retiree paid) and your Medicare Part B premium without reimbursement from the District. Your medical and prescription coverage will be administered and billed directly to you by CalPERS. A combined Dental/Vision plan (currently via Delta Dental and VSP) can also be purchased through SSP at full cost and prepaid monthly. Monthly plan premiums are given in the SSP Benefit Rates document included in the SSP packet.
- After enrollment in SSP, you will be contacted by MyBenefits if any additional information is needed, and you can contact MyBenefits with questions on the program.

## **CalPERS Health Benefits / Retirement Pension**

CalPERS is the District's current health plan provider for active employees and eligible retirees, and it provides retirement pensions for many FHDA retirees. CalPERS requests that it receive notice of a retiree's death in a timely manner in order to update the member's account(s). NOTE: in some situations, FHDA will report the death directly to CalPERS.

<https://www.calpers.ca.gov/page/retirees>

- Notification options:
  - Online application form: (<https://www.calpers.ca.gov/page/active-members/death-benefits/application-process/notify-calpers-of-a-death>)
  - By phone: (916) 795-3240 / FAX (916) 795-3933 / TTY (916) 795-3240
  - By mail: **CalPERS Disability & Survivor Benefits Division**  
**Survivor & Death Benefits**  
**P.O. Box 162**  
**Sacramento, CA 95812-1652**
  - In-person: visit Headquarters and Regional office near you  
(<https://www.calpers.ca.gov/page/contact/headquarters-regional-offices>)
- Information to provide with the above options:
  - Date of death;
  - Name and Social Security number or CalPERS ID of deceased;
  - Name, address, telephone number, date of birth, date of marriage/domestic partner registration certificate, and Social Security number of surviving spouse or registered domestic partner; if no spouse or registered domestic partner, name, address, telephone number of closest next of kin or person designated to settle the estate who is providing notice of death.
- Completion/return of the Death Benefit Application packet :
  - Once notified, CalPERS will mail you a Death Benefit Application packet, which includes forms and a list of documents required to update the retiree's account(s) and to initiate any death benefit payment. You do not need to mail originals—copies of official documents are accepted;
  - This packet is mailed only after a death is reported and cannot be downloaded or ordered online;
  - The completed forms and copies of documents can be returned by mail to the CalPERS address above; if you have a MyCalPERS account, contact CalPERS to ask if it is possible to upload documents via the website. You will be contacted if any additional information is needed.

## **CalSTRS Retirement Pension**

CalSTRS provides retirement pensions for many FHDA retirees. CalSTRS requests that it receive notice of a retiree's death in a timely manner in order to update the account(s) of a member, option beneficiary, and any benefit recipient(s).

<https://www.calstrs.com/reporting-a-death/> (Form)

<https://www.calstrs.com/notification-of-death-faq> (FAQs)

- Notification Options:
  - Online form: submit an online Notice of the Death form of a CalSTRS member, benefit recipient, option beneficiary, or designated recipient at <https://my.calstrs.com/MyCalSTRSWebUI/NOD/Pages/NOD.aspx>;
  - By phone: **800-228-5453** or **916-414-1099**. For the security of your account information, be prepared to provide your Client ID or Social Security number and date of birth;
  - By email: send a secure message to member services via the online inquiry form (<https://my.calstrs.com/MyCalSTRSWebUI/Page/CalSTRSComWebWrap.aspx?PageName=SubmitInquiryNoLogin>) ;
  - Via a myCalSTRS online account: log in to send personal account questions to a CalSTRS representative;
  - By mail:  
**CalSTRS**  
**P.O. Box 15275**  
**Sacramento, CA 95851-0275**
  - In person: visit a member service center (<https://www.calstrs.com/member-service-centers>) or a local benefits planning office (<https://www.calstrs.com/local-offices>).
- Information to provide with the above notification options:
  - Deceased person's name and Social Security number or CalSTRS Client ID;
  - Date of death;
  - Name, address, and telephone number of a contact person.
- Completion of Survivor Benefit Application: a caseworker will contact the benefit recipient by letter to complete the application for survivor benefits. A copy of the official death certificate must be sent to CalSTRS. Additional information or documentation may be requested.
- Payment of benefits (<https://www.calstrs.com/survivor-benefits-45fd651>): CalSTRS generally pays survivor benefits to beneficiaries or the estate within 45 days of receiving all necessary information. Payment could be delayed if documentation, e.g., marriage certificate or the Recipient Designation form, is missing or not received in a timely manner.
  - Any payments issued after the death are due back to CalSTRS and, if not returned, will be deducted from benefits paid to beneficiaries;
  - If there is no surviving spouse or domestic partner, eligible dependent children or parents, any remaining Defined Benefit and Defined Benefit Supplement contributions and interest in the deceased account will be paid to the one-time death benefit recipient, or, if none, CalSTRS will make the payment to the estate.