



Retired Employees Association of Orange County

REAO, P.O. Box 11787
Santa Ana, CA 92711-1787
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Website: www.reaoc.org
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SURVIVORS' CHECKLIST

This information will assist surviving spouses and other beneficiaries of deceased retirees in determining their eligibility for various types of benefits.

Death Certificate (Orange County)

Be prepared to submit several certified copies of the death certificate when filing claims. If the death occurred in Orange County, certified copies of the death certificate may be obtained from the Orange County Birth and Death Registration within 10-14 days of the death. Phone (714) 480-6710 for an application form, or visit the web site via computer at <http://ochealthinfo.com/phs/about/dcepi/bd/death> to download the form, which you must have notarized before mailing. Certified copies of death certificates may be purchased by mail if the death occurred in Orange County. The request should be sent to County of Orange Health Care Agency Birth and Death Registration, P.O. Box 234, Santa Ana, CA 92702-0234. Please include a legal-sized, stamped, self-addressed envelope with your order. You do not need notarization if you visit the office in person at 1200 N. Main St., Suite 100A, Santa Ana to obtain a certified death certificate. Payment can be made by cash, personal check, cashier's check or money order. The fee for each certified copy of a death certificate is \$12.00 each.

Orange County Employees Retirement System (OCERS)

2223 Wellington Avenue, Santa Ana, CA 92701
(714) 558-6200 or (888) 570-6277

Notify OCERS immediately of the retiree's death. Talk with the Survivors Benefit supervisor to verify certain benefits that may be payable to beneficiaries (for example: continuance, annuities and burial benefits). You will need to submit the retiree's death certificate, your birth certificate, marriage license (if applicable), and the Social Security number, address and phone number of each beneficiary. OCERS notifies the County of Orange Benefits Center (see below) of survivors/beneficiaries.

County of Orange Benefits Center (Medical Insurance)

(866) 325-2345

When notified by OCERS, the County of Orange Benefits Center will send a packet to the survivor regarding information about continuation of health insurance and any other benefits through the County of Orange. You will need the deceased retiree's Social Security number to access information about benefits. Call toll-free at (866) 325-2345.

Social Security

(800) 772-1213 or www.ssa.gov

For the Social Security Administration office nearest you, call (800) 772-1213. A beneficiary may be eligible for a lump sum death benefit. Spouses, former spouses, and minor children may be eligible for certain benefits.

Orange County Federal Credit Union

See the phone book for the branch office nearest your home, or call (714) 755-5900. Contact the Credit Union regarding access to the deceased retiree’s accounts or trust funds, as well as insurance. Also inquire about possible insurance on outstanding loans. You will need a certified death certificate and, in case of trust funds, a copy of the trust.

Veterans Service Office

1300 S. Grand, Building B, Santa Ana, CA 92705
(714) 567-7450

Contact this office regarding veteran’s benefits, if applicable.

Dental and Vision Insurance

OCEA (714) 835-3355

Contact OCEA if the deceased had a DeltaCare Dental Plan or VSP Vision Plan through the Orange County Employees Association (OCEA). OCEA also carries other types of insurance.

Pacific Group Agencies, Inc. (800) 511-9065

Contact Pacific Group Agencies if the deceased had a dental policy (Ameritas PPO, Cigna HMO), vision policy (Medical Eye Services), or other supplemental benefits.

Other Insurance

Lodges, service clubs, labor unions, professional associations, and other credit unions may offer benefits to beneficiaries, including life insurance and dental plans. Also contact past employers of the deceased about possible remaining or deferred benefits.

Important Telephone Numbers for my family:
