



peba academy  PEBA  
SC Retirement Systems  
and State Health Plan

# Death claims: types

Retirement Benefits Training  
Fiscal year 2024



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## How PEBA receives member death notifications

- Employers.
- Family, friends of the deceased.
- Social Security Administration (SSA).
- South Carolina Department of Health and Environmental Control (DHEC).
- Obituaries.
- Funeral homes.

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## Required actions after a death

- Employer:
  - Complete *Final Payroll Certification – Death* task on the Task List in EES.
  - View [Death of covered employee](#) employer checklist.
- Beneficiary:
  - Provide PEBA with certified copy of the member’s death certificate.
  - Return completed benefit payment forms.
  - Send copies of your Social Security card and current driver’s license.

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3

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### Active member

- Deceased employee was:
  - On covered employer's payroll; and
  - Making contributions.
- Beneficiaries may be eligible for:
  - Refund of member contributions and interest;
  - Monthly survivor benefit payment;
  - Incidental death benefit payment; and
  - Accidental Death Program benefit (PORS only).



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### Inactive member

- Deceased employee was:
  - No longer active member; and
  - Not retired on date of death.
- Beneficiaries may be eligible for:
  - Refund of member contributions and interest; or
  - Monthly benefit payment in some cases.
- Monthly benefit payment possible if member was eligible for service retirement at time of death.



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### Working retired member

- Working retiree was:
  - On covered employer's payroll; and
  - Making contributions.
- Beneficiaries of working retiree may be eligible for:
  - Payment according to retiree's payment option; and
  - Active incidental death benefit.



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### Non-working retired member

- Beneficiaries of a retiree who was not in service with a participating employer at death may be eligible for:
  - Payment according to retiree's payment option; and
  - Retired member incidental death benefit.



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### Disclaimer

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