


peba academy 

# Death claims: types

Retirement Benefits Training  
Fiscal year 2023

1

---

---

---

---

---

---

---

---

## 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.

PEBA Academy | employer training 2

2

---

---

---

---

---

---

---

---

## 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.

PEBA Academy | employer training 3

3

---

---

---

---

---

---

---

---

### 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).

4

---

---

---

---

---

---

---

---

### 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  - No longer active member; and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.

5

---

---

---

---

---

---

---

---

### 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.

6

---

---

---

---

---

---

---

---

### 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.

7

---

---

---

---

---

---

---

---

### Disclaimer

This presentation does not constitute a comprehensive or binding representation of the employee benefit programs PEBA administers. The terms and conditions of the employee benefit programs PEBA administers are set out in the applicable statutes and plan documents and are subject to change. Benefits administrators and others chosen by your employer to assist you with your participation in these employee benefit programs are not agents or employees of PEBA and are not authorized to bind PEBA or make representations on behalf of PEBA. Please contact PEBA for the most current information. The language used in this presentation does not create any contractual rights or entitlements for any person.

8

---

---

---

---

---

---

---

---