

Survivor Checklist



When a loved one passes away, the emotional weight can make even simple tasks feel overwhelming. This checklist is meant to provide clarity and structure during a difficult time, helping survivors stay organized and understand the financial steps that may come next.

Contact the Employee Assistance Program



- The Employee Assistance Program offers confidential support to employees and their families during difficult times, such as loss, financial, or legal challenges.
 - Call Aetna Resources for Living at (800) 221-0945, available 24/7, and identify your relationship to the County employee.
 - To access informational resources online, visit resourcesforliving.com and use the username **Orange County CA** and access code **eap**.
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Obtain Death Certificates



- You'll need at least one certified copy of the death certificate to claim benefits.
 - For deaths in Orange County, request copies from the Office of Vital Records (714-480-6700, 200 W. Santa Ana Blvd., Suite 100-B).
 - Approximately 6 weeks after the passing, you can also contact the [County Clerk Recorder](#) at (714) 834-2500, 601 N. Ross Street, Santa Ana.
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Review County Health Care Coverage Options



- Call the Benefits Service Center at 1-833-476-2347 for help with continuing health insurance and other benefits offered by the County of Orange.
 - Have the deceased's social security number handy when you call to assist with locating accounts.
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Inquire about Supplemental Coverage Options



- Groups like unions may offer benefits to members, including life insurance.
 - To view the list of County Union contacts, [click here](#).
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Discuss Pension Payments



- Contact the Orange County Employees Retirement System (OCERS) at (714) 558-6200 to discuss retirement or cash payments.
- Please have a death certificate, and if needed, a marriage certificate. The beneficiary will need to sign the required forms.
- The office is at 2223 Wellington Ave, Suite 100, Santa Ana, 92701.

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Collect Payroll and Personal Belongings



- Let the employee's department and supervisor know about the passing, and arrange to collect any personal belongings.
- [Click here](#) to view the list of Department contacts.
- Call the Auditor-Controller's Office at (714) 834-2450 (1770 N. Broadway, Santa Ana) to discuss final paychecks and ask about any unused leave balances.



Inquire about Retirement Savings Plans

- If you believe your loved one had a defined contribution plan, call Empower Retirement at (866) 457-2254.
- Have the deceased's social security number handy to assist with locating any accounts.



Review Health Reimbursement Arrangement Funds

- If your loved one may have had a Health Reimbursement Arrangement (HRA) plan, call Gallagher HealthInvest HRA at (833) 382-2617. They can help you set up a survivor account to pay for eligible medical expenses.
- Have the deceased's social security number handy to assist with locating any accounts and have a copy of the death certificate ready.



Inquire about Social Security Benefits

- Reach out to the [Social Security Administration](#) at (800) 772-1213 or your local office to ask about possible benefits for survivors.



Contact the OC Credit Union (If Applicable)

- Call the Orange County Federal Credit Union at (888) 354-6228 to discuss accounts or balances.
- Have a death certificate ready, and be prepared to provide required signatures.
- Ask if there's any insurance on accounts or loans.



Other Considerations:

- If your loved one's estate (including life insurance) is over \$600,000, a tax advisor or the [State Controller's Office](#) (916) 445-8717 can help with inheritance tax questions or releasing bank accounts. Their address is P.O. Box 942850, Sacramento, CA 94250-5873.
- For veterans benefits, call the [County of Orange Veterans Service Office](#) at (714) 480-6555, 1300 South Grand, Building B, Santa Ana.
- You may also want to contact past employers to check for any remaining or deferred benefits.
- Look into possible death benefits tied to mortgages, loans, or credit accounts.