

WHAT TO DO WHEN A RETIREE DIES



United Federation of Teachers
A Union of Professionals

I. Things You Should Have

- a. Collect all relevant papers and documents. This includes wills, insurance policies, annuities, deeds, statements of ownership, bills and loans.
- b. Originals or copies of death certificates are needed for most agencies you need to notify; e.g. NYC Teachers' Retirement System, Social Security, etc.

II. Health and Welfare Coverage

The federal Consolidated Omnibus Budget Reduction Act – COBRA, Public Law 99-2721, Title X – requires the New York City Employee Benefits Program to offer the opportunity for a temporary extension of group health and welfare coverage. This continuation coverage pertains to ALL health benefits, including optional benefits and Welfare Fund benefits. The rates charged for continuation coverage are 102% of the group rates for a surviving spouse/domestic partner/ dependents.

Under COBRA, the spouse/domestic partner or dependent child has the responsibility to notify the Employee Benefits Program and the UFT Welfare Fund within 60 days of the death of the retiree, divorce, legal separation, or a child losing dependent status. Notification should be sent by certified mail to:

NYC Employee Benefits Program
Attention: COBRA
22 Cortlandt Street, 12th Floor
New York, NY 10007 212-513-0470

UFT Welfare Fund
Attention: COBRA
52 Broadway – 7th floor
New York, NY 10004 212-539-0500

III. Retirement Allowance

- a. Return the last check received after the death of the retiree. The Retirement System will return to the beneficiary the pro-rated amount due for the days prior to the member's death.
- b. Send an original death certificate to the Teachers' Retirement System, which will begin procedures to notify the beneficiary (ies) if the retiree had selected an option when he/she retired. Send the information to the address below:

NYC Teachers' Retirement System
55 Water Street
New York, NY 10041 888-8NYCTRS (69-2877)

IV. Welfare Fund

The Welfare Fund extends coverage to the surviving spouse/domestic partner/dependents for an *additional three months beyond the month the member dies.*

V. SHIP

SHIP coverage terminates upon receipt of death certificate. If any refunds are due, same will be processed automatically. Spouse/domestic partner may continue to be covered by SHIP with the proper health plan – free for 36 months. As soon as possible, write to:

UFT SHIP
52 Broadway – 17th floor, New York, NY 10004 212-228-9060

continued

WHAT TO DO IF A RETIREE/PARTNER DIES (continued)

VI. Reimbursements

a. Medicare, Part B.

If the retiree and/or the spouse/domestic partner were Medicare-eligible and paid for Medicare, Part B, the surviving spouse/domestic partner/dependents or estate would be eligible for the reimbursement up to the date of death of the retiree. Write a letter to:

City of New York/ Health Benefits Program
22 Cortlandt Street
12th Floor, Medicare Unit
New York, NY 10007

b. Optional Rider Reimbursement

The surviving spouse/domestic partner/dependents are eligible for the reimbursements of the optional rider up to the date of death of the retiree. Contact:

UFT Welfare Fund
52 Broadway – 7th Floor
New York, NY 10004 212-539-0500

VII. UFT Legal Plan

Call the UFT Legal Plan Attorneys at 800-832-5182

VIII. NYSUT Policies

Please contact NYSUT Members Benefits at 800-626-8101 if you participate in a NYSUT benefit plan (i.e. life, long-term care, catastrophic).

IX. Social Security Administration (Contact your local office)

- a. Return the check received after the death of member. Social Security does not reimburse any part of the check.
- b. Only the spouse may apply for \$255 toward burial from Social Security.
- c. Send a death certificate.

X. Veterans Administration (Contact your local office)

- a. Reimbursement of up to \$150 toward a purchased cemetery plot.
- b. All other veteran benefits the member may have been entitled to.

XI. Please send a copy of the Death Certificate to:

UFT Membership Department
52 Broadway – 11th floor
New York, NY 10004 212-598-6855

XII. UFT-RTC

If you have any further questions please contact:

UFT-RTC Pension Department
52 Broadway – 17th floor
New York, NY 10004 212-598-9536