

Guide for State Executive Branch Employees - Death of Spouse or Dependent

This GUIDE is intended as a checklist of offices you need to contact and some important forms you may need to file when your spouse or dependent passes away. It does not constitute a legal document or contract. It lists only some of the benefits that may be available. State benefits vary by type of employment appointment and collective bargaining agreement, and are subject to change. For further information, contact your Departmental Human Resources Office, or refer to the applicable rules, laws, collective bargaining agreements, executive orders, or benefit plan documents.

Contact your Departmental Human Resources Office (DHRO) if you experience a loss of your spouse or dependent. Many of these forms can be accessed from the Human Resources Office.

MAJOR BENEFITS		
	<i>Forms You May Need to Complete</i>	<i>Contact/Website Information For Forms</i>
Tax Withholding Forms	<input type="checkbox"/> HW-4 Employee's Withholding Allowance & Status Certificate – State of Hawaii, Dept. of Taxation <input type="checkbox"/> W-4 Employee's Withholding Allowance Certificate – U. S. Treasury, Internal Revenue Service (IRS) If applicable, submit completed form(s) to your DHRO.	Department of Taxation website: http://tax.hawaii.gov/forms/ IRS website: http://www.irs.gov/Forms-&-Pubs
Employee's Designation of Beneficiary	<input type="checkbox"/> Employee's Designation of Beneficiary, Form D-90 – Department of Accounting & General Services If applicable, submit the completed form to your DHRO.	You may request the form from your DHRO.
Employees' Retirement System (ERS)	<input type="checkbox"/> Contributory/Hybrid Plan Designation of Beneficiary ERS Form 1-A If applicable, send completed form to: Employees' Retirement System City Financial Tower, 201 Merchant Street, Suite 1400 Honolulu, Hawaii 96813-2980	ERS (Oahu): 586-1735 Neighbor island members may call the island offices. Hawaii: 974-4076, 974-4077 Kauai: 274-3010, 274-3011 Maui, Molokai/Lanai: 984-8181, 984-8282 Website: http://ers.ehawaii.gov
Health Benefits – Hawaii Employer-Union Health Benefits Trust Fund (EUTF)	<input type="checkbox"/> EUTF Enrollment Form for Active Employee Form EC-1 To cancel your spouse or dependent from your EUTF plans, submit completed form to your DHRO.. <input type="checkbox"/> Premium Conversion Plan (PCP) Election Change Form PCP-2 If you are enrolled in the PCP, complete the form within 90 days of your spouse/dependent's death and submit it to your DHRO. The change will become effective on a prospective basis from the employer's receipt date.	EUTF: 586-7390 1-800-295-0089 (toll-free) Website: www.eutf.hawaii.gov
Life Insurance – USABLE Life	<input type="checkbox"/> Group Term Life Insurance Beneficiary Designation Form If you need to change your beneficiary, download the Beneficiary Designation Form, complete, sign and return to USABLE Life. Your designations are not valid until received and accepted by USABLE Life. <ul style="list-style-type: none"> • Fax: (808) 538-8932 • Email: EUTF.custserv@usablelife.com • Mail: P.O. Box 840, Honolulu, HI 96808-0840 	USABLE Life: 538-8920 1-855-207-2021(toll-free) Website: https://www.usablelife.com/portal/eutf
State Deferred Compensation Plan-Island Savings Plan (IRC 457)	<input type="checkbox"/> Beneficiary Designation Form If you are enrolled in the Island Savings Plan and wish to change your beneficiary, you may either update your account online or call Prudential Retirement. If you are a designated beneficiary of a deceased spouse/dependent who also worked for the State of Hawaii, please contact Prudential Retirement to discuss options available to you.	Prudential Retirement Representative: 1-888-712-5642 Prudential Local Office: 1-888-712-5642, press "2" 1100 Alakea Street, Suite 1550, Honolulu, HI 96813 Website: http://prudential.com/islandsavings
Tax-Sheltered Annuity (TSA) Plan (403(b)) (Applicable to DOE & UH Employees Only)	If you are enrolled in a TSA, and wish to change your beneficiary designation, please contact your financial advisor or investment provider for instructions.	Call National Benefit Services (NBS) at 1-800-274-0503, option 5.

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Part-time, Temporary & Seasonal (PTS) Deferred Compensation Retirement Plan	If you are in the PTS Plan and wish to change your beneficiary, call Comprehensive Financial Planning, Inc.	Comprehensive Financial Planning, Inc.: 596-7006 or 1-800-600-7167 Website: www.compfinplan.com
Island Flex (Flexible Spending Accounts)	If you are enrolled in the <i>Island Flex</i> Plan and wish to change your designation amount for your flexible spending account, you may do so within 90 days of your spouse/dependent's death. Contact Comprehensive Financial Planning, Inc. The change will become effective on a prospective basis from the receipt date of your request.	Comprehensive Financial Planning, Inc.: 596-7006 or 1-877-550-5552 Website: www.compfinplan.com
Other Considerations if Your Spouse or Dependent...	Was a veteran , you should contact the Veteran's Administration to find out if any benefits are available.	Veterans Benefits Administration Honolulu Regional Benefit Office 459 Patterson Road, E-Wing Honolulu, HI 96819-1522 1-800-827-1000
	Was retired military , you should contact the appropriate military branch office, including the National Guard, because your family may be entitled to assistance from a Survivor's Assistance Officer to help you during this time of need and to help you apply for the various benefits to which you may be entitled.	
	Earned enough Social Security credits , you should contact Social Security Administration for information on social security benefits you may be entitled to.	Social Security Administration Prince Kuhio Federal Building 300 Ala Moana Blvd., Rm. 1114 Honolulu, HI 96850 1-800-772-1213
	Was a member of an employee organization (union) , you should contact the appropriate employee organization to find out if you are covered by that organization's insurance plan.	
	Belonged to a credit union , you should contact one or more of the credit union; there may be checking, savings, and loan accounts in his/her name.	
	Need to have his/her final tax return filed , you may contact Internal Revenue Service/Hawaii State Tax Office for information/assistance.	Internal Revenue Service Prince Kuhio Federal Building 300 Ala Moana Blvd. Honolulu, HI 96850 524-5953 State of Hawaii Department of Taxation Taxpayer Services 830 Punchbowl Street Honolulu, HI 96813 587-4242

For further information, please contact your Departmental Human Resources Office.

Human Resources Offices

Accounting and General Services	586-0369
Agriculture	973-9481 or 973-9482
Attorney General	586-1236
Budget and Finance	586-1598
Business, Economic Development and Tourism	586-2435
Commerce and Consumer Affairs	586-2838
Defense	733-4243
Education - Employee Benefits Unit	441-8311
Governor's Office	586-0130
Hawaii State Public Library System	831-6860
Hawaiian Home Lands	620-9540
Health	586-4512
Human Resources Development	587-1150
Human Services	586-5003
Labor and Industrial Relations	586-9044
Land and Natural Resources	587-0180 (TTD: 587-0190)
Lieutenant Governor's Office	586-0255
Public Safety	587-1221
Taxation	587-1504 (TTD: 587-1417)
Transportation	587-2145
University of Hawaii	956-8643

TTD = Text Telephone (for equal access to telephone use)