



Board of Administration Agenda Item 8a

September 21, 2016

Item Name: Proposed Decision – In the Matter of the Application for Death Benefits Payable on Account of Jose D. Torres by JUANA TORRES, Respondent, and JOSE L. TORRES, Respondent

Program: Benefit Services Division

Item Type: Action

Parties' Positions

Staff argues that the Board of Administration should adopt the Proposed Decision.

Respondent Juana Torres (Respondent Juana Torres) argues that the Board of Administration should adopt the Proposed Decision.

Respondent Jose L. Torres (Respondent Jose Torres) argues that the Board of Administration should decline to adopt the Proposed Decision.

Strategic Plan

This item is not a specific product of either the Strategic or Annual Plans. The determination of administrative appeals is a power reserved to the Board of Administration.

Procedural Summary

Respondent Juana Torres submitted an application as the sole beneficiary for Death Benefits Payable on Account of Jose D. Torres. Respondent Jose Torres submitted an application for Non-Member Survivor Benefits Payable on Account of Jose D. Torres. CalPERS determined that member Jose D. Torres' survivor benefits should be paid statutorily pursuant to Government Code section 21493, with Respondents Juana Torres and Jose Torres each receiving one-half the total amount of survivor benefits. Respondent Juana Torres appealed this determination and the matter was heard by the Office of Administrative Hearings on June 27, 2016. A Proposed Decision was issued on July 14, 2016, granting the appeal of Respondent Juana Torres and ordering that she should be the sole beneficiary of member Jose D. Torres' CalPERS survivor benefits.

Alternatives

- A. For use if the Board decides to adopt the Proposed Decision as its own Decision:

RESOLVED, that the Board of Administration of the California Public Employees' Retirement System hereby adopts as its own Decision the Proposed Decision dated July 14, 2016, concerning the application of Juana Torres; RESOLVED FURTHER that this Board Decision shall be effective 30 days following mailing of the Decision.

- B. For use if the Board decides not to adopt the Proposed Decision, and to decide the case upon the record:

RESOLVED, that the Board of Administration of the California Public Employees' Retirement System, after consideration of the Proposed Decision dated July 14, 2016, concerning the application of Juana Torres, hereby rejects the Proposed Decision and determines to decide the matter itself, based upon the record produced before the Administrative Law Judge and such additional evidence and arguments that are presented by the parties and accepted by the Board; RESOLVED FURTHER that the Board's Decision shall be made after notice is given to all parties.

- C. For use if the Board decides to remand the matter back to the Office of Administrative Hearings for the taking of further evidence:

RESOLVED, that the Board of Administration of the California Public Employees' Retirement System, after consideration of the Proposed Decision dated July 14, 2016, concerning the application of Juana Torres, hereby rejects the Proposed Decision and refers the matter back to the Administrative Law Judge for the taking of additional evidence as specified by the Board at its meeting.

- D. Precedential Nature of Decision (two alternatives; either may be used):

1. For use if the Board wants further argument on the issue of whether to designate its Decision as precedential:

RESOLVED, that the Board of Administration of the California Public Employees' Retirement System requests the parties in the matter concerning the application of Juana Torres, as well as interested parties, to submit written argument regarding whether the Board's Decision in this matter should be designated as precedential, and that the Board will consider the issue whether to designate its Decision as precedential at a time to be determined.

2. For use if the Board decides to designate its Decision as precedential, without further argument from the parties.

RESOLVED, that the Board of Administration of the California Public Employees' Retirement System, hereby designates as precedential its Decision concerning the application of Juana Torres.

Budget and Fiscal Impacts: Not applicable

Attachments

Attachment A: Proposed Decision

Attachment B: Staff's Argument

Attachment C: Respondent's Argument

DONNA RAMEL LUM
Deputy Executive Officer
Customer Services and Support