

Fresno USD Surviving Spouse/Family Member Checklist

The following checklist is a guide for use by family members of a deceased Fresno Unified School District employee/retiree.

CALSTRS/CALPERS/Defined Benefits – Make arrangement for any refunds or pension funds due. For more information, family member(s) may call:

For Certificated Staff, CALSTRS at 1-800-225-5453 or visit www.calstrs.com

For Classified Staff, CALPERS at 1-888-225-7377 or visit www.calpers.com

For Defined Benefits, Fresno Unified Benefits Department (applicable to part-time employees) at 559-457-3520.

Payroll/Final Wage Statement/Pay Warrant (Active Employees)

1. Check with H.R. at 559-457-3500 regarding an executed payroll beneficiary form (Gov. Code 53245). Any final wage or pay amounts will be redirected to the beneficiary on file in Human Resources. Should this beneficiary not exist or should there be conflicting beneficiary information, any final wages will be paid “care of the estate” of the deceased. Final wages are paid in the payroll cycle following the notification and change in the Human Resources system.
2. Check with Payroll Dept. at 559-457-3514 to determine if a 403 B exists. All 403B transfers or withdrawal requests require Third Party Administrator Approval. Fresno Unified School District is the acting third party administrator and processes all documentation for the District in conjunction with Valic and their “My Retirement Manager” Software. To request a distribution as a beneficiary, send the request along with the paperwork approving the beneficiary to Payroll Department (FAX: 559-457-6206).

Benefits Department

1. Inquire about potential Life Insurance Benefits at 559-457-3520 (District provided or external policy).
 - a. Death Certificate to be requested from surviving spouse/family member for claims purpose.
2. COBRA (Continuation of Health Benefits at cost) or if a retiree, retiree health benefits.

☐ **Voluntary Deductions (Active Employees)** - Check with Payroll Department at 559-457-3514 regarding any current voluntary deductions (AD&D, supplemental Insurance, cancer policy) that may be occurring.

☐ **Personal Property (Active Employees)** – Contact Risk Management at 559-457-3561 or work site/Dept. to determine if personal property needs to be collected and how it can be retrieved by the surviving spouse/family member.

☐ **Employee Assistance Program.** EAP benefits may available through Claremont EAP. If available, surviving family member(s) can contact Claremont EAP at 800-834-3773 for purposes of grief counseling or other available EAP services (financial, legal).

☐ **Social Security Administration.** Recommend surviving family member contact Social Security Administration at 1-800-722-1213 regarding any available benefits.