Fresno USD Surviving Spouse/Family Member Checklist

The following checklist is a guide for use by District staff, when assisting the dependent(s)/surviving spouse of a deceased Fresno Unified School District employee/retiree.

☐ CALSTRS/CALPERS/Defined Benefits – Determine the applicable retirement system so surviving family member can make arrangements for any refunds or pension funds due. For more information, family member(s) may call:

- CALSTRS at 1-800-225-5453 or visit www.calstrs.com
- CALPERS at 1-888-225-7377 or visit www.calpers.com
- Fresno Unified Benefits Department (applicable to part-time employees) at 559-457-3520.

☐ Employee Benefits Department to inquire about the following:

1. Life Insurance (District provided or external policy).
   a. Death Certificate to be requested from surviving spouse/family member.
2. COBRA (Continuation of Health Benefits at cost).
3. Obtain copy of any wills, probate documents or other beneficiary forms that may assist in determine processing of final pay warrant, defined benefits or other related benefits.

☐ Social Security Administration. Recommend surviving family member contact Social Security Administration (phone #) regarding any available benefits. Staff to inquire about defined benefits payout for part-time employee.

☐ Voluntary Deductions. Check with Payroll Department regarding any current voluntary deductions (AD&D, supplemental Insurance, cancer policy) that may be occurring.

☐ Personal Property – Site or Dept. to be contacted to determine if personal property needs to be collected and how it can be retrieved by the surviving spouse/family member. (Risk Management)

☐ Final Wage Statement/Pay Warrant. Check with H.R. 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.
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).

Bargaining Units/Professional Organizations. Refer surviving family member to respective collective bargaining association and/or other professional organizations who may also have relevant information. (i.e. FTA, SEIU, CSEA, Building Trades, ACSA, EECU, California Nurses Association, etc.)

403 B. Check with Payroll Dept. 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).