Your retiree benefits --

What to do when a retiree dies …

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Updated September 2026

Please Note: *This document is not legal advice. Its use is solely intended as the basis for a conversation with your* executor*, dependents, family members, estate planners, and investment and legal advisors (such as a certified elder-law attorney) for use at the time of the retiree's death.*

✶ ***It is very important to notify WTW,*** (Willis Towers Watson, *Lumen's Pension Administrator)* ***at 1-888- 324-0689 as soon as possible after the death.***

They will…

- **Process a death report**, by asking your executor or beneficiary for the deceased's *Full name *Birth and Death dates *SSN *Mailing address *Where they worked/retired from (ex. Legacy Qwest, etc.) and their *Marital status.

- **Ask for verification of the beneficiary's info**: Their name, their phone number, and their relationship to the deceased.

- **Pass the Death Report information to Lumen's** ***Health & Life Service Center*** *at 800-729-7526* (Business Solver), so they can look up the deceased's **HRA** (Health Reimbursement Account) and their **Basic Life 10K Insurance policy** information along with other pertinent information, including information concerning the **Survivor Option**.

- **Pass information from the Death Report to the MetLife Insurance Company** so they can send a Death Claim Packet to your beneficiary to receive the 10K Basic Life Insurance. Other pertinent information will also be in the packet and they will ask for a notarized death certificate to be sent to them.

The service center at 833-925-0487 may also call the beneficiary in regard to the deceased's HRA. If there is a balance, they will explain how to submit a claim for reimbursement, and cover any other applicable information with your beneficiary.

Telephone Concession Service (also known as "discounted service"). If the retiree received the concession telephone service provided by CenturyLink, it will continue "as long as *everything* remains the same," including AutoPay and the bank account information. ✶ The *executor* or beneficiary can call CenturyLink's Solutions Department at 1-800 577-4049 with questions, or to disconnect their service.

Most mortuaries will notify the **Social Security Administration** of the death. ✶ Check with them to make sure they have and, if not, you can notify the SSA at their website: www.SSA.gov. The hearing-impaired number is ***1-800-325-0778.*** ✶ Social Security will stop *Medicare Parts A and B*, ending any auto-payments. They may or may not stop your *Medicare Advantage Plan* and probably will not stop your *Medigap and Part D Drug plans*. Therefore, it's best to call any Medicare Advantage, Medigap or Part D Drug Plan administrator and notify them of the death and ✶ cancel any auto-payments.

Veterans Administration: If the deceased retiree was a veteran, the Veterans Administration should be contacted to advise them of the retiree's death and to determine if there are any eligible survivor benefits. Contact them by calling **1-800-827-1000** or at the website: www.VA.gov.

Lumen's Survivor Guide is on the Health and Life website. It contains further information, and a description of benefits for each retiree population. It can be viewed at: http://www.lumen.com/healthbenefits by selecting Reference Center, then General Information, and then the Survivor Benefits folder. Direct link: (www.tinyurl.com/3usaue82)

- **Lumen Service Center contact numbers.**
  - ***For questions related to your HRA:*** **(833)-925-0487**
  - ***For questions related to all other benefits****:* *(Survivor benefits / Continuation of Medical, Dental via COBRA / Life insurance / 401K / Pension / Stock Options / Etc.)* **(800) 729-7526**