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| **DEPARTMENT OF ADMINISTRATION** | **STATE OF WISCONSIN** |
| Central Payroll |  |
| Version 1.1 (12/2024) |  |

DEATH OF AN EMPLOYEE CHECKLIST

**NOTE:** This checklist is designed to guide Agency Payroll through each step to complete after an employee’s death. Refer to the

[Death of an Employee Job Aid](https://dpm.wi.gov/Documents/JobAids/HCM/PY/Death-of-EE-job-aid.pdf) for complete instructions of each of these checklist items.

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| **Employee Information** | | | | | | |
| Employee Name | Empl ID | | Empl Record | Pay Group | Date of Death | Final Paycheck Date |
| **Estate / Beneficiary / Next of Kin Information** | | | | | | |
| Name | Relationship to Employee | Phone Number or Email Address | | | Address | |
| **Within 24 hours of Notification of Death** | | | | | | |
| Notify beneficiary of additional items that require action:   * To have beneficiary or estate submit additional documentation for paychecks after death. Refer to instructions in [Death of an Employee Job Aid](https://dpm.wi.gov/Documents/JobAids/HCM/PY/Death-of-EE-job-aid.pdf). * To obtain a certified copy of death certificate to provide to ETF. * To contact additional organizations if necessary (SSA, WDC, companies unrelated to state employment). | | | | | | |
| Notify [Employee Trust Funds](https://etf.wi.gov/contact-us) (ETF) of employee’s death.   * Provide employee’s name, social security number, date of death, date of birth and next of kin information above. | | | | | | |
| If employee’s death was due to a work-related injury, notify your agency’s Worker’s Compensation Coordinator immediately. | | | | | | |
| **Prior to Final Check Confirmation** | | | | | | |
| Notify Agency HR to enter termination in Job Data.   * If one or more paychecks are dated year after date of death, refer to additional instructions in [Death of an Employee Job Aid](https://dpm.wi.gov/Documents/JobAids/HCM/PY/Death-of-EE-job-aid.pdf). | | | | | | |
| Update Federal and State Tax Data to “No taxable gross; no tax taken”.  *Navigation: Workforce Administrator > Payroll > Payroll Processing > Pay Data > Update Employee Tax Data* | | | | | | |
| Inactivate Direct Deposit.  *Navigation: Workforce Administrator > Payroll > Payroll Processing > Pay Data > Request Direct Deposit* | | | | | | |
| Update Paycheck Name to “Estate of Employee Name”.  *Navigation: Workforce Administrator > Payroll > Payroll Processing > Pay Data > Update Payroll Options* | | | | | | |
| Review Benefits to ensure correct refunds are scheduled to process.  *Navigation: Workforce Administrator > Benefits Administration > Benefit Enrollments > Review Employee Benefits > Benefits Summary* | | | | | | |
| Calculate and process final payout or collection of leave.  *Navigation: Workforce Administrator > Payroll > Payroll Processing > POTT > Enter POTT – By Batch* | | | | | | |
| **As Soon as Possible after Final Check Confirmation** | | | | | | |
| Zero out any remaining employee absence balances.  *Navigation: Workforce Administrator > Payroll > Absence Management > Maintain Absences > Adjust Absence Balances* | | | | | | |
| Certify sick leave credits on [myETF Benefits](https://etf.wi.gov/employers/insurance-programs) within 30 days of death. | | | | | | |
| Complete and mail continuation forms to beneficiary within 5 days of death for applicable insurances.   * If employee was enrolled in life insurance, complete and send to Securian [Notice of Death](https://etf.wi.gov/publications/et6301/download?inline=) form.   . | | | | | | |
| **Check applicable box below:**  Send copies of additional beneficiary or estate documentation to [Central Payroll](mailto:doacentralpayroll@wisconsin.gov) for processing.  Send copies of mailed requests to [Central Payroll](mailto:doacentralpayroll@wisconsin.gov) if additional documentation is not received after second request.  No documentation required (no earnings after date of death or earnings included in ACH processed normally). | | | | | | |
| Update address in Modify a Person to include “c/o” and name of beneficiary or estate administrator. | | | | | | |