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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).
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| [ ]  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.
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| [ ]  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).
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| [ ]  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.

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| **Check applicable box below:****[ ]** Send copies of additional beneficiary or estate documentation to Central Payroll for processing.**[ ]** Send copies of mailed requests to Central Payroll 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. |