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| **DEPARTMENT OF ADMINISTRATION** | **STATE OF WISCONSIN** |
| Central Payroll |  |
| Version 1.0 (3/2024) |  |

DEATH OF AN EMPLOYEE CHECKLIST

 **NOTE:** This checklist **must** be completed and sent to Central Payroll for processing when there is an employee 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 [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).
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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://trust.etf.wi.gov/ETFaMEBWeb/aMEB/aMEBLogon.jsp) 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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| [ ]  Notify beneficiary of additional items that require action:* To obtain a certified copy of death certificate to provide to ETF.
* To contact Social Security Administration, Wisconsin Deferred Compensation or other institutions for which employee has assets.
* To have estate complete a W-9 form if there were earnings reported after date of death. If there is no estate or the estate will not have an FEIN, contact Central Payroll immediately with beneficiary/next of kin name address to reissue final paycheck(s).
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| **[ ]** Send copy of completed W-9 form (if applicable) and this checklist to Central Payroll for processing.  W-9 Attached: Yes [ ]  No (Estate/beneficiary did not complete) [ ]  N/A (No earnings after date of death) [ ]  |
| **Agency Acknowledgement** |
| Name of Person Completing Checklist      | Phone Number or Email Address      | Date      |