

Handle the Death of an Employee Checklist

Send Condolences to Family/Next of Kin

- Determine the appropriate HR representative to send the employer's condolences to the employee's family/next of kin.
- Offer the representative advice and support before and after they contact the employee's family/next of kin, as appropriate.
- Have the representative obtain the wishes of the family/next of kin regarding:
 - The employer informing staff (and external contacts such as customers, if appropriate) about the employee's death; and
 - Funeral arrangements, including whether flowers should be sent or a donation to their charity of choice should be made instead.

Inform Staff of the Employee's Death and Offer Support

- Take into account the wishes of the employee's family/next of kin regarding the announcement.
- Communicate the news to staff closest to the employee and those with the most critical need to know as soon as possible.
- After such key employees are informed, notify the wider workforce.
- Choose an internal representative for employees who have questions or concerns to contact.
- Consider allowing employees appropriate time off to grieve and/or to attend the funeral or memorial service.
- Consider offering counseling services to employees.
- If there is an existing employee assistance program (EAP), remind employees that it is available.
- Have a senior member of staff attend the funeral or memorial service to pay the employer's respects, if appropriate.
- Consider ways the employee could be memorialized (e.g., scholarship fund or lasting tribute).

Make Arrangements to Cover the Employee's Duties

- If the employee's duties were not already being covered, reallocate the employee's duties to existing staff or hire a temporary worker.
- Appoint a permanent replacement for the employee after an appropriate period of time has passed.
- Act sensitively when appointing either a short-term or long-term replacement since it may be difficult for others to see someone else carrying out the employee's role.
- Act quickly to cover the employee's duties to alleviate any feelings of uncertainty among staff.
- Make clear who is responsible for each work area and what is required of them.
- If necessary, arrange for briefing sessions to bring staff up to speed with an area of work that they are not used to or a customer or client with whom they are unfamiliar.

Inform External Contacts of the Employee's Death

- Take into account the wishes of the employee's family/next of kin regarding what and how much information is passed on to external contacts.
- Determine the most appropriate method for communicating the news.
- Choose the appropriate person within the organization to communicate the news (e.g., another employee that knows the external contact in question or the person taking over the employee's duties with that contact).
- Inform all current external contacts (e.g., customers and suppliers) who dealt with the employee about their death.
- Reassure external contacts that handover measures are being put in place and that the employer is taking steps to ensure the employee's death will not affect business.

Make Arrangements for Final Wage Payments and Benefits Processing

- Determine and comply with the applicable state law regarding final wage payments for deceased employees.
- Follow applicable federal and state employment tax withholding and reporting requirements regarding a deceased employee's final payments, and, if necessary, consult tax advisors.

- Follow state law (or organizational policies if there is no applicable state law) regarding the treatment of accrued but unused paid time off, vacation, sick and any other leave.
- Follow applicable law in order to properly turn over any compensation owed to the deceased employee's estate or survivors.
- Find any applicable beneficiary designations for all benefits.
- If possible, meet with beneficiaries to discuss applicable benefits and the claims administration process.
- Determine what documentation is needed to process paperwork for all benefits offerings (e.g., life insurance or retirement plans).
- Notify any appropriate insurance providers about the employee's death immediately.
- Terminate health insurance benefits by following the insurance policy's procedures.
- Process applicable COBRA paperwork for any dependents covered under the group health plan.
- Ensure that any letters enclosing forms or paperwork that are sent to the employee's family/next of kin are not addressed to the employee.

Follow Normal Termination Procedures to Address Equipment and Security Issues

- Ensure that the employee is removed from all directories (e.g., telephone, email or online) and from the organization's website.
- Divert the employee's telephone calls, emails and mail to a responsible replacement.
- Inform all internal departments and external bodies that keep records of employees about the employee's death.
- Follow the organization's normal termination procedures to ensure that all employer property is returned (e.g., equipment, devices, credit cards or keys).
- Address all other normal security issues associated with a termination of employment.

Arrange for Packing and Delivery of Personal Belongings

- Have a designated person keep track of all communications, flowers, and other items that are sent to the workplace so that appropriate responses are sent and the items are collected for the family/next of kin.

- Ask the employee's family/next of kin whether they would prefer to pack up the employee's belongings or for a close work colleague to do so instead.
- Follow the wishes of the family/next of kin regarding packing and delivery.

Consider Any Other Practical Issues