

Checklist: Death of an Employee

Stage One: Immediate Response and Communication

If death (or serious accident/illness) occurs at work:

- Call 911.
- Call the employee's emergency contact person, if designated, or other known family member to advise of the situation.
- Send a spokesperson to the hospital to meet family.
- Contact OSHA at 1-800-321-OSHA if death/accident is work-related.
- Notify employees/executives with most critical need to know first, including HR.
- Upon death, notify the remaining employees indicating details will be forthcoming.
- Follow existing internal procedures regarding contact with the media as needed.
- Be sensitive to the family and ask for the name of a contact person who can provide funeral details when known and arrange for benefits procedures to be completed when appropriate.
- Designate an internal contact person for employees who have any questions or concerns to prevent employees from trying to contact the family directly.

If death occurs outside of work:

- Notify employees/executives with the most critical need to know first, including HR.
- Notify the remaining employees, indicating details will be forthcoming as available.
- Be sensitive to the family and ask for the name of a contact person who can provide funeral details and arrange for benefits procedures to be completed when appropriate.
- Designate an internal contact person for employees who have any questions or concerns to prevent employees from trying to contact the family directly.
- Follow existing internal procedures regarding contact with the media as needed.

Stage Two: Handling Arrangements and Keeping Business Moving

- Notify customers/clients with direct relationships and reassign work as appropriate.
- Arrange to intercept and redirect phone, voicemail, email and mail communications.
- Arrange grief counseling for employees through an EAP or local hospice. Provide grieving employees with time off as needed (immediately if they witnessed the death) preferably on a paid basis.

- Begin termination processing following normal procedures (see the section on benefits below).
- Have designated contact person keep track of all notes, flowers, etc. that arrive following the death so they can be responded to and collected for the family. Photographing flower arrangements received is an option when the family has suggested donations in lieu of flowers.

Planning for funeral/memorial service:

- Determine where to send flowers according to the family's wishes.
- Inform employees if donations are requested in lieu of flowers.
- Arrange for time off to attend the services. Consider the impact on business but also recognize that many employees may feel a need to attend the service. Be flexible and provide paid time off if at all possible.
- Arrange for a special or lasting tribute or memorial taking into consideration the culture of the company, how well known the person was, employee suggestions, etc. Ideas include: holding a company service separate from the funeral, displaying a plaque in the office, creating a memory book for the family with notes and pictures from coworkers.
- Consider creating a memorial fund/scholarship. Contact local financial institutions to find out what options exist in situations where there are a number of employees who wish to donate, young children left behind by the employee, etc.

Stage Three: After the Funeral/Final Wages/Benefits Processing

- Locate beneficiary designations for all benefits.
- Schedule time to meet with the employee's beneficiaries if possible.
- Confirm state law regarding final pay for deceased employees and associated tax issues and comply promptly with all rules. Consult with tax advisors if necessary.
- Treat accrued but unused vacation, sick, PTO, etc. in accordance with state law or company policy.
- Determine what documentation (i.e., certified death certificate) is needed to process benefits paperwork for life insurance, pension/401(k), workers compensation death benefits, etc.
- Terminate health insurance benefits according to policy as of date of death.
- Determine health care flexible spending account funds available for health expenses prior to the employee's date of death and notify family of procedures for reimbursement.
- Process COBRA paperwork for dependents covered on the group health plan.
- Follow normal termination procedures to ensure all equipment, keys, credit cards, etc. are returned and security issues are addressed.

- Arrange for packing and delivery of personal belongings (ask family how they want this handled). A close colleague or supervisor is best choice if family prefers not to be involved.