



Death of Employee: Checklist

Stage One Immediate Response and Communication

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

- Call 911;
- Call employee's emergency contact person, if designated, or other known family member to advise of employees' removal to hospital;
- Have a spokesperson travel to 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 remaining employees indicating details will be forthcoming;
- Follow existing internal procedures regarding contact with the media as needed;
- Be sensitive to family ask for the name of a contact person who can provide funeral details when known, answer questions about the family's wishes 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 most critical need to know first, including HR;
- Notify remaining employees indicating details will be forthcoming as available;
- Be sensitive to family ask for the name of a contact person who can provide funeral details when known, answer questions about the family's wishes 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 relationship and reassign work as appropriate;



- Arrange to intercept and redirect phone, voicemail, email and mail communications;
- Plan for counseling for employees through EAP or local hospice appropriate to the circumstances; surrounding the death.
- 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 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:

- Flowers determine where they are to be sent according to family's wishes;
- Donations may be requested in lieu of flowers; communicate to employees as appropriate;
- Time off consider 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;
- Special or lasting tribute or memorializing consider possibilities depending upon the nature of the company, how well known the person was, what employees seem to want, etc. Ideas: company service separate from funeral, plaque displayed in office, memory book for family with notes from coworkers, etc.;
- 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/Follow Up

Final Wages/Benefits Processing:

- Schedule time to meet with beneficiaries if possible;
- Locate beneficiary designations for all benefits;
- 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, if any. Or, follow company policy if no law exists, and/or treat similar to wages if no other guidance is available;



- Determine how many certified death certificates will be needed to process benefits paperwork including:
 - Life insurance
 - Accidental death and dismemberment, if applicable
 - Pension/401(k)
 - Workers Compensation death benefits, if applicable;
- Terminate health insurance according to policy as of date of death;
- Determine balance of health care flexible spending account for health expenses prior to date of death notify family of procedure;
- Handle COBRA paperwork for dependents.

Other Considerations:

- Follow normal termination checklist 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); offer to do it for them if preferred. A close colleague or supervisor is best choice if family prefers not to be involved;
- Be sensitive to the family; ask for the name of a contact person who can provide funeral details when known; answer questions about the family's wishes and arrange for benefits procedures to be completed when appropriate;
- Remember first few anniversaries quietly perhaps with a moment of silence
- Keep in touch with family as appropriate.