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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](mailto:doacentralpayroll@wisconsin.gov) 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). | | | | | | | |
| 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.   . | | | | | | | |
| 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](mailto:doacentralpayroll@wisconsin.gov) immediately with beneficiary/next of kin name address to reissue final paycheck(s). | | | | | | | |
| Send copy of completed W-9 form (if applicable) and this checklist to [Central Payroll](mailto:doacentralpayroll@wisconsin.gov) 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 |