Employer checklist Death of a covered employee



Please note, not all items apply to all employers.

Employer to-do's: insurance benefits

All changes are effective the day after the death, except for Basic Life and Optional Life insurance changes, which are effective the date of death.

- **□** Report death to PEBA as soon as possible.
- Terminate employee's coverage in EBS. Select
 Death as the termination reason and enter the required dates, including the date of death.
- If employee was receiving long term disability benefits, contact The Standard via phone or email to advise them of the death so any potential benefits can be paid to eligible survivors.
- Notify survivors of insurance coverage options and have them complete the required forms with required documentation, if applicable.

Employer to-do's: retirement benefits

- **□** Report death to PEBA as soon as possible.
- □ Complete the *Final Payroll Certification* on the Task List in EES.
- Notify survivors of State ORP participants to report death to the State ORP service provider and work directly with the provider regarding the death claim process.
- Notify survivors of Deferred Comp participants to report death to the Deferred Comp service provider and work directly with the provider to submit a death claim.

Survivor to-do's

- Submit a certified copy of the member's death certificate and any additional documentation as requested by PEBA.
- For retirement, complete the following forms PEBA sends to the beneficiary:
 - Election of Death Benefits (Form 4151).
 - If survivor will receive a monthly retirement benefit:
 - <u>Withholding Certificate for Periodic Pension or</u> <u>Annuity Payments</u> (IRS Form W-4P);
 - <u>Withholding Certificate for Monthly Benefit</u> <u>Payments</u> (Form 7202); and
 - *Direct Deposit Authorization* (Form 7204).
 - Notice of withholding forms if you will receive a refund of the member's contributions or the incidental death benefit.
- Survivors of State ORP participants must report the death to the member's service provider and work with the provider regarding the process for claiming the account.
- Survivors of Deferred Comp participants should contact the Deferred Comp service provider and work directly with the provider to submit a death claim.

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