



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.
- ☐ Review insurance coverage options and complete a [Survivor Notice of Election](#) and [Certification Regarding Tobacco and E-cigarette Use](#) form if enrolling in insurance coverage. Submit any required documentation.
- ☐ 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:
 - [Withholding Certificate for Periodic Pension or Annuity Payments](#) (IRS Form W-4P);
 - [Withholding Certificate for Monthly Benefit Payments](#) (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.