

**Checklist – Death of Employee
For Designated Human Resources (HR) Representatives**

Name of Deceased: _____

Campus/School/Program: _____

Checklist includes, but may not be limited to, the following applicable actions:

Pay- and HR-related matters:

- Contact UH Payroll Office at 956-7444 immediately to report the death of an employee. Report the death of BOR and Civil Service employees, including the name of the deceased, payroll number and date of death. The UH Payroll Office will process payment to the beneficiary(ies).
- Contact System OHR Point of Contact (POC) immediately to report the death of a Civil Service employee.
- Obtain a copy of the death certificate from the family of the deceased. For deceased executive/managerial, faculty and APT employee, prepare the payroll notification form (PNF) or UH Form 6 in PeopleSoft with the termination code 815 (Death). Refer to [PeopleSoft manual](#) for instructions.
- Provide a copy of the death certificate to System OHR POC for a deceased Civil Service employee. System OHR will prepare the PNF.
- Calculate the pro-rata summer pay, if any, for the deceased EM employee/faculty and pay accordingly.
- Upon receipt of the UH Payroll Office memo, the Fiscal Administrator will prepare the Disbursement Voucher (DV) to process the post death payment to the designated beneficiary(ies) or estate. This is the final payment of a deceased employee's compensation (e.g., regular pay, vacation pay, retroactive pay, overtime pay, pro-rata summer pay, etc.).
- Ensure supervisor reviews and/or approves any pending leave requests taken prior to time of death. The HR representative shall prepare any leave requests required up to the time of death. Prepare and process the [Form G2](#) Application for Transfer of Vacation and Sick Leave Credit or Payment in Lieu of Vacation. The Form G2 [instructions](#) are available.
- Maintain all records (e.g., personnel, payroll, Form I-9, Tuberculosis (TB) Clearance, etc.) in accordance with applicable record retention policies and procedures. NOTE: All personnel and timekeeping records must be kept in a safe and confidential manner for 30 years from the date of separation or death.

Benefits:

- Complete [EC-1 Enrollment form](#) to cancel health benefits as soon as possible. Enter in remarks that copy of death certificate is forthcoming. Fax EC-1 form to EUTF at (808) 586-2161. Upon receipt of a copy of the death certificate, fax the front and back of the death certificate to EUTF.
- Notify Securian Financial by telephone at (808) 536-9890 or toll-free (877) 291-8466. The life insurance company requires a copy of the death certificate when it becomes available.
- Fax the PNF to ERS for deceased executive/managerial, faculty and APT employee at (808) 587-5766; System OHR shall fax the PNF for deceased civil service employee.
- Contact System OHR POC and inquire if the deceased participated or is currently contributing to the tax shelter annuity program and/or deferred compensation Island Savings program (ISP). Provide contact information to the family. ISP - Phone (888) 712-5642 (press 2 for local office) NOTE: ISP requires the original death certificate.
- Contact System OHR POC to confirm if the deceased was participating in the Island Flex Flexible Spending Account program.
- Notify respective union organization of the death of the employee and provide union contact information to the family.
- Return the parking permit to the respective campus Parking Office for any prorated adjustment, as applicable. Cancel the parking pass.

Electronic Systems:

- Cancel access to various University systems.
- Complete application security worksheets to cancel access, as applicable: PeopleSoft/HR datamart/Non-PeopleSoft HR systems.
- If deceased was a supervisor, use [Profiler](#) to designate an alternate supervisor for the on-line leave system.