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YC DEATH OF AN EMPLOYEE PROCEDURE

Employee Name: ______________________________ Date of Death: ______________

Supervisor Name:______________________________ Email:______________________

Stage One: Immediate Response and Communication

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

☐ 1. Call 911.

☐ 2. Call the employee's emergency contact person, if designated, or other known family member to advise of the situation. The Chief Human Resources Officer or designee will make this phone call.

☐ 3. Send a spokesperson to the hospital to meet family. The Chief Human Resources Officer or designee will meet the family.

☐ 4. Contact OSHA at 1-800-321-OSHA if death/accident is work-related. The OSHA Coordinator will notify OSHA.

☐ 5. Notify employees/executives with most critical need to know first, including HR. Individuals to be notified include ELT, Marketing, Supervisor.

☐ 6. Upon death, notify the remaining employees indicating details will be forthcoming. The Supervisor will notify co-workers and other employees.

☐ 7. Follow existing internal procedures regarding contact with the media as needed. Marketing will serve as the media contact for all employee deaths.

☐ 8. Be sensitive to the family and ask for the name of a contact person who can provide funeral details when known and arrange for benefits procedures to be completed when appropriate. Same person as in #3 above.

☐ 9. Designate an internal contact person for employees who have any questions or concerns to prevent employees from trying to contact the family directly. This person will either be the HR Business Partner or the Supervisor.

If death occurs outside of work:

☐ 1. Notify employees/executives with the most critical need to know first, including HR. Individuals to be notified include ELT, Marketing, Supervisor?

☐ 2. Notify the remaining employees, indicating details will be forthcoming as available. The Supervisor will notify co-workers and other employees.

☐ 3. Be sensitive to the family and ask for the name of a contact person who can provide funeral details and arrange for benefits procedures to be completed when appropriate. The Chief Human Resources Officer or designee will meet the family.

☐ 4. Designate an internal contact person for employees who have any questions or concerns to prevent employees from trying to contact the family directly. This person will either be the HR Business Partner or the Supervisor.

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☐ 5. Send employee photo to marketing

☐ 6. Follow existing internal procedures regarding contact with the media as needed. Marketing will serve as the media contact for all employee deaths.

<u>Stage Two</u>: Handling Arrangements and Keeping Business Moving

☐ 1. Notify customers/clients with direct relationships and reassign work as appropriate. This will be done by the Supervisor, Dean, or VP depending on position.

☐ 2. Arrange to intercept and redirect phone, voicemail, email and mail communications. This will be done by the Supervisor in conjunction with IT.

☐ 3. Arrange grief counseling for employees through an EAP or local hospice. Provide grieving employees with time off as needed (immediately if they witnessed the death) preferably on a paid basis. Work with CHRO or HR Business Partner.

☐ 4. Begin separation processing following normal procedures (see the section on benefits below). This will be done by the HR Business Partner.

☐ 5. 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. Supervisor will coordinate this.

Planning for funeral/memorial service:

☐ 1. Determine where to send flowers according to the family's wishes. HR Business Partner

☐ 2. Inform employees if donations are requested in lieu of flowers. HR Business Partner in collaboration with supervisor and/or marketing. (This will also go in Dr. Rhine's announcement.)

☐ 3. Arrange for time off to attend the services. Consider the 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. Arrange for executive presence. This will be done by supervisor and ELT.

☐ 4. Arrange for a special or lasting tribute or memorial taking into consideration how well known the person was, employee suggestions, etc. Ideas include: holding a college service separate from the funeral, displaying a plaque in the office, creating a memory book for the family with notes and pictures from coworkers. Supervisor and/or Marketing will coordinate this.

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☐ 5. Consider creating a memorial fund/scholarship. (Foundation in conjunction with Supervisor)

Stage Three: Final Wages/Benefits Processing – Functions performed by HR BUSINESS PARTNER & PAYROLL

☐ 1. Locate beneficiary designations for all benefits.

☐ 2. Schedule time to meet with the employee's beneficiaries if possible.

☐ 3. Confirm state law regarding final pay for deceased employees and associated tax issues and comply promptly with all rules. Consult with Payroll Manager and tax advisors if necessary.

☐ 4. Treat accrued but unused vacation, sick, personal time, etc. in accordance with state law and company policy.

☐ 5. Determine what documentation (i.e., certified death certificate) is needed to process benefits paperwork for life insurance, standard (ASRS or ORP) retirement, voluntary retirement (403(b) or 457) 401(k), workers compensation death benefits, etc. Complete and submit notifications to vendors per procedures.

☐ 6. Terminate employee in Banner according to policy as of date of death. This information will feed to Benefit Focus via our demographic file, and then to our benefits vendors, except for the retirement plans. In some cases, you may/will want to reach out directly to some vendors for information or instructions.

☐ 7. Verify if the employee had any of the following coverages in effect: Basic Spouse Life, Basic Child Life, Supplemental Spouse Life or Supplemental Child Life. These include a right to convert or port to an individual policy once terminated and we are required to provide the family members with notification on this. The following notice can be provided: U:\Shr_hr\HR Operations\Desk Top Manual Project\Desk Top Manual\11 Separations\Securion Life Ins._Continue Coverage Handout.pdf

☐ 8. File an electronic eClaim notice on Securion website to start the life insurance claim process. Collect information for this process including a snip of the life insurance beneficiary(ies). Review if there was an employee supplemental life policy in place along with the Basic Life/AD&D. Once a claim number is issued, provide this to the beneficiary for reference if they would like to contact Securion for help with the claims process. Claims: (888) 658-0193

☐ 9. Contact FSA administrator (Summit) to determine health care flexible spending account funds available for health expenses prior to the employee's date of death and notify family of procedures for reimbursement.

☐ 10. If the employee has an HSA account, provide the beneficiary with document(s) on the process for handling of the account. Health Equity has the following form on their website: https://resources.healthequity.com/Forms/HSA_Instructions_Upon_Death_Form.pdf

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☐ 11. Contact the retirement vendor for instructions regarding procedures for the employee's account(s). Provide information to the beneficiary as appropriate.

☐ 12. Notify family members of benefits provisions and that COBRA paperwork will be mailed to the dependents covered on the group health plans (medical, dental, vision, FSA, EAP).

☐ 13. If voluntary benefits have been elected, advise the beneficiary that we will notify the vendors and the plans will be ended. Some plans may offer an option to continue the benefits on a direct pay basis. Confirm for any benefits that the employee elected. *

☐ 14. Follow normal termination procedures to ensure all equipment, keys, credit cards, etc. are returned and security issues are addressed.

☐ 15. Arrange for packing and delivery of personal belongings (ask family how they want this handled). A close colleague or supervisor is best choice if family prefers not to be involved.

NOTES: