



Prepared by the Personnel Management Office.
This replaces Administrative Procedure No. A9.780
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July 1986

SEPARATION FROM SERVICE

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A9.780 REPORTING OF AND ACTIONS REQUIRED UPON THE DEATH OF A UNIVERSITY EMPLOYEE

1. Purpose. To prescribe the procedure for reporting and taking actions required upon the death of a University Employee in accordance with Section 88-84 HRS, Ordinary Death Benefits, Section 88-85 HRS, Accidental Death Benefits and Section 87-4 HRS, State and County Contribution to Health Fund (Life Insurance Policy).
2. Objective.
 - a. To facilitate and expedite the preparation and processing of forms and other documents upon notification of an employee's death.
 - b. To insure that the beneficiary(ies) of a deceased employee receives benefits provided under existing State and Federal statutes and regulations.
 - c. To minimize direct involvement with the family of the deceased.
3. Applicability/Responsibility.
 - a. This instruction covers all employees of the University.
 - b. Vice Presidents, Chancellors, State Director for Vocational Education, Manoa Deans and Directors who have been delegated personnel functions or their designees (henceforth referred to as Administrative Officer) have primary responsibilities for the execution of this procedure.
4. Procedures.
 - a. Operating units (departments, programs, offices, etc.) are to notify the appropriate Administrative Officer immediately that an employee has died.
 - b. Upon receiving notification of an employee's death the

Administrative Officer is to:

- 1) Notify the Office of the Vice President for University Relations if the employee was a Board of Regents appointee.
 - 2) Use the "Checklist of Actions Required to Ensure Timely Receipt of Death Benefits" (Attachment 1) to complete the required forms and to notify the applicable organizations, agencies and/or companies. After each item has been checked and annotated on the checklist, the administrative officer may appoint a responsible person from within the operating unit to act as liaison between the immediate family and the University.
 - 3) Notify the University Payroll Section in the Disbursing Office immediately of the name of the deceased, social security number and the date and time of death. This may be done verbally.
 - 4) Prepare Standard Form 5B, UH Notification of Personnel Action or UH Form 6, UH Overload and Casual Notification of Personnel Action, as appropriate for BOR employees or for civil service employees, prepare and submit a memorandum to the University Personnel Office, Civil Service Section, indicating the date and time of death, the work week schedule and the last duty day.
 - 5) Include the death of a Board of Regents employee in the next report of personnel action to the Board of Regents.
 - 6) Submit a completed Health Fund Form N-1 and Standard Form 5B to the Personnel Management Office for batching and subsequent transmittal to the appropriate agencies and/or offices.
 - 7) Send the UH Form 6 directly to the Payroll Section.
- c. University Personnel Management Office: The University Personnel Management Office upon receiving the appropriate documents reporting a death shall:
- 1) Prepare the SF-5, Notification of Personnel Action, for the Civil Service employee as

applicable.

- 2) Transmit the SF-5B to the agencies affected and the Form N-1 to the State Health Fund Office.
- d. Disbursing Office: The Disbursing Office upon receiving notification of the death shall:
- 1) Request that the Department of Accounting and General Services have the employee's paycheck made out to the designated beneficiary, and
 - 2) Provide the administrative officer, upon request, information to prepare the documents in the checklist, e.g. enrollment in credit union.
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UNIVERSITY OF HAWAII
CHECKLIST OF ACTIONS REQUIRED
TO ENSURE TIMELY RECEIPT OF DEATH BENEFITS

Name of Deceased _____

Department _____ SS # _____

Check each item or program in which the deceased was enrolled or participating in and follow up to ensure that all applicable forms have been completed and processed and that the appropriate agencies/companies have been notified.

- [] Medical Plan
Refer to Part G, back of Form N-1, Hawaii Public Employees Health Fund, Notice of Benefits Changes or Terminations Due to Personnel Action.
- [] Dental Plan
Refer to Part G, back of Form N-1
- [] Life Insurance Plan
Upon receipt of Form N-1 (a death certificate must be attached), the Health Fund Office will contact the carrier. The carrier will then contact the designated beneficiary.
- [] Employees' Retirement System
Call Employees' Retirement System for information and assistance. Honolulu - 548-8405 or 548-4548
- [] Employee Organization or Bargaining Unit
Payroll deduction to _____
Call _____ for information on benefits.
- [] Credit Union
Payroll deduction to University Credit Union. Call 948-8578 for information.
- Tax-Shelter Annuity (Type in name of the company.)
Payroll deduction to _____
Call local insurance company office for information
Phone number _____
- [] Deferred Compensation
Payroll deduction to Hawaii Benefits Incorporated (State of Hawaii Deferred Compensation)
Phone (808) 523-9102
- [] Social Security
Call local office for information

- NOTES:
- . Workers' Compensation: If death was caused or believed to have been caused by industrial injury or illness, the organization of assignment must follow the industrial injury reporting procedure (A9.720).
 - . If the deceased has any vacation or prorata pay due, it will be paid to the designated beneficiary by the State of Hawaii provided a form G-2, Application for Transfer of Vacation and Sick Leave Credit or Payment in Lieu of Vacation, is prepared and processed immediately upon learning of the employee's death for employee's who are on the vacation accrual system.
 - . Questions may be referred to the appropriate administrative officer.