



Documentation/Activity Checklist in the Event of a Death

This checklist is intended as a general guide to assist individuals and families in organizing tasks and documentation following the death of a loved one. It includes a combination of essential actions and optional considerations. Not all items may apply to every situation and may not be specific to the University of Pittsburgh. Additionally, some steps may vary depending on personal circumstances, local laws, or institutional policies.

Please use this checklist at your own discretion and consult with legal, financial, or professional advisors as needed. This document is not a substitute for professional advice or services.

Immediately After Death (0–24 hours)

Confirm and Document the Death	Completed	N/A
Contact emergency services or hospice (if not already present)		
Obtain a legal pronouncement of death (by a doctor or coroner)		
Collect Essential Documents		
ID of the deceased (driver's license, passport)		
Medical records (if needed for cause of death)		
Do Not Resuscitate (DNR) order (if applicable)		
Death Certificate (10-15 copies) <i>Obtained through funeral director or county health department.</i>		
Social Security Number		
Marriage License (if applicable) <i>Obtained through county clerk where your marriage license was issued.</i>		
Birth Certificates (for dependent children) <i>Obtained through the public health office of the state or county where the child was born.</i>		
Will (original copy) <i>Contact the deceased's lawyer or check in safe deposit box. You will need the original will.</i>		
Veteran's Discharge Papers (Form DD-214) (if applicable) <i>Contact Department of Veteran Affairs (VA): va.gov</i>		
Most Recent Tax Return		
Insurance Policies <i>Contact your agent or insurance company.</i>		



Within One to Three Days

Funeral & Memorial Planning	Completed	N/A
Contact funeral home or cremation service		
Notify the University of Pittsburgh		
Department and Colleagues		
Active Employee Death <i>Contact the University of Pittsburgh Benefits Department 833-852-2210 or Submit an inquiry to Benefits.</i>		
Retiree Death <i>Contact UPMC Benefit Management Services at 1-888-499-6885, option 3.</i>		

Within One to Two Weeks

Legal & Estate Matters	Completed	N/A
Locate and review estate planning documents <i>Discounts and Services included for those enrolled in the Hartford life insurance at no additional cost. For general questions, please contact: 1-855-396-7655</i>		
Financial & Insurance Notifications		
Notify life insurance companies		
Any Individual Policies		
University Policies: THE HARTFORD GROUP <i>Life, Accidental Death & Dismemberment, and Dependent Life Plans and Policies Enrollment Beneficiary Management</i> enroll.thehartfordatwork.com/upittbene Initiate a Claim: 1-888-755-1503 Check a Claim: 1-888-563-1124 Coverage and Beneficiary Information: 1-855-396-7655 Evidence of Insurability Information: 1-800-331-7234 Portability/Conversion: 1-877-320-0484 General Questions: 1-855-396-7655		
Retirement Savings For questions associated with the Retirement Savings Plan, including the 457(b) plan, the 403(b) and the 401(a) plans, self-directed brokerage accounts, the streamlined investment menu, and more, please contact TIAA online at TIAA.org/pitt or by calling 800-682-9139, Monday - Friday from 8 a.m. - 10 p.m., Saturday, 9 a.m. - 6 p.m.		



<p>Paycheck and Tax Documents Contact the University of Pittsburgh for the final paycheck and tax documents. All questions can be submitted through the online inquiry system, or call HR Client Services at 412-624-7000. Inquiries for the deceased employee's spouse should be initiated by the employee's department, as all payroll actions are initiated at the department level.</p>		
<p>Contact Medicare or Social Security (if applicable) medicare.gov or ssa.gov</p>		

Within One Month

Apply for Benefits	Completed	N/A
<p>Life Insurance Claims THE HARTFORD GROUP <i>Life, Accidental Death & Dismemberment, and Dependent Life</i> Plans and Policies Enrollment Beneficiary Management enroll.thehartfordatwork.com/upittbene Initiate a Claim: 1-888-755-1503</p>		
<p>Health Care Continuation (COBRA or retiree benefits)</p> <p>Active Faculty and Staff Member Benefits Call the University of Pittsburgh's Benefits Department at 833-852-2210 or submit an inquiry to Benefits for continuation of benefits for Surviving Spouses and/or COBRA. Active benefits may have included medical, dental, vision, prescription drug coverage, life insurance, retirement savings, long-term care, etc.</p> <p>Retired Faculty and Staff Member Benefits Call the University of Pittsburgh's Retiree Benefits Services Center at 888-499-6885, ext. 3, for continuation of benefits for Surviving Spouses and/or COBRA. Retiree benefits may have included medical, dental, vision, prescription drug coverage, long-term care, etc.</p>		

Additional Resources & Support

<p>Financial Planning <i>Discounts and Services included for those enrolled in the Hartford life insurance at no additional cost.</i> <i>For general questions, please contact: 1-855-396-7655</i></p>		<p>N/A</p>
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<p>Estate Settlement <i>Discounts and Services included for those enrolled in the Hartford life insurance at no additional cost. For general questions, please contact: 1-855-396-7655</i></p>		N/A
<p>Personal & Emotional Support <i>Discounts and Services included for those enrolled in the Hartford life insurance at no additional cost. To access these services, register online at join.empathy.com/hartfordcare.</i></p>		N/A
<p>LifeSolutions <i>The University's Employee Assistance Program, LifeSolutions, offers additional support and resources including confidential counseling and coaching services, and legal and financial consultations to employees and their household members. Sessions are available in person, via video, or by telephone. To speak with a specialist or schedule an in-person appointment, please call 1-866-647-3432.</i></p>		N/A