



Death of an Employee Checklist

This checklist was developed to assist employees and their families in preparing for and addressing the details that must be handled following the death of an employee. To ensure that your survivors are adequately prepared in the event of your death, please complete Part 1 and then review this checklist with your family. Ensure this checklist is stored in a safe place along with other important family documents.

Part 1 of the checklist should be completed by the employee and updated periodically when the recorded information changes. Please keep a copy of your current benefits enrollment confirmation with this document, so that your survivors have information on your benefits through Delta. You can access your current benefit enrollment information through the Benefits Direct Web site on DeltaNet.

Part 2 of the checklist should be used after the employee's death by survivors or representatives of the estate. Information in this section will guide them through the steps required to ensure the appropriate actions are taken to notify Delta and request applicable benefits or services they may be eligible to receive.

Part 1- Employee Information

To be completed by the employee and reviewed with family members. Update this section periodically as information changes. Ensure this checklist is stored in a safe place with other important family documents.

Employee's Full Name (as it appears on your paycheck):

First Name: _____

Middle Name or Initial: _____

Last Name: _____

Nine-Digit Employee Number:

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Date of Employment: Month: _____ / Day: _____ / Year: _____

Pass Eligibility Date *: Month: _____ / Day: _____ / Year: _____

*In most cases this is the same as the original date of employment):

Department Number: _____

Department Name: _____

Department Mailing Address: _____

City: _____ State: _____ Zip: _____

Manager's Name: _____

Manager's Phone: _____

HR Representative: _____

HR Rep. Phone: _____

(A list of Field HR Generalists names and phone numbers is located on the Employee Connection site on DeltaNet. On the right navigation bar under Other Sites and Information click on HR Resources and then click on Frequently Called Numbers. On the Frequently Called Numbers page, click on the letter "H" at the top of the page to locate Delta Human Resources and the link to the list of Generalists.)

Part 2 – Survivor Checklist

To be used by survivors or representatives of an employee’s estate in the event of an employee’s death.

In the event of an employee’s death, it is very important to contact the Employee Service Center (ESC) at 1-800 MY DELTA (1-800-693-3582), Monday through Friday, 8:00 a.m. – 5:00 p.m. Eastern Time, except holidays, as soon as possible to report his or her passing. The surviving family members may be eligible for benefits under the Delta Family-Care Disability and Survivorship Plan (the “D&S Plan”) and/or the Delta Retirement Plan (the “Retirement Plan”). The death should be reported as soon as possible to ensure timely set up of any benefits to which surviving family members may be entitled.

In order to determine benefit eligibility, the ESC must first be notified as indicated below.

Step	When	What to Do
1	Employee Death	<p>A surviving family member (or someone on his/her behalf) should contact the Employee Service Center (ESC) at 1-800 MY DELTA (1-800-693-3582) Monday through Friday, 8:00 a.m. – 5:00 p.m. Eastern Time, except holidays, to report the employee’s death. Once connected to the phone prompt, follow the steps below to reach a survivor benefit representative:</p> <ul style="list-style-type: none"> • Press “3” to be connected with the ESC • Press “2” to report the death of an employee <p>The survivor will be asked a series of questions, including the date of death, cause of death, names of survivors, etc. They will also receive information about the overall process and timeline.</p>
2	As soon as possible after reporting the death	<p>Within five business days after the death is reported, the Employee Service Center (ESC) will send a letter to the surviving family member, including an Income Eligibility Statement, and a phone contact list for other companies the survivor may need to call (i.e. MetLife, Delta Community Credit Union, etc).</p>

Part 2 - Survivor Checklist (continued)

Step	When	What to Do
<p style="text-align: center;">2 (continued)</p>	<p>As soon as possible after reporting the death</p>	<p>The surviving family member (or someone on his/her behalf) should complete the Income Eligibility Statement and return the completed form to the Employee Service Center (ESC) with the following documentation as soon as possible in order to arrange processing of any available survivor benefits in a timely manner.</p> <ul style="list-style-type: none"> • Death Certificate for the deceased employee • Marriage Certificate (photocopy acceptable) - <i>if applicable</i> • Birth Certificates for the deceased employee, the surviving spouse/domestic partner/same-sex spouse and dependent children (photocopy acceptable) - <i>if applicable for surviving spouse/domestic partner/same-sex spouse and dependent children</i> • Copies of all Social Security Award Letters for surviving spouse and dependent children - <i>if applicable</i> <p>Submit the completed Income Eligibility Statement and supporting documentation to: Fax: 602-797-6276 Mail: Delta Air Lines, Inc ESC - Survivor Benefits P.O. Box 52175 Phoenix, AZ 85072</p>

Survivor Benefits Overview

The Employee Service Center (ESC) will review the Income Eligibility Statement and supporting documentation that the surviving family member (or someone on his/her behalf) submits. Generally within 15 days, the ESC will send the survivor a letter listing the survivor benefits that he or she is entitled to receive, including income benefits and nonrevenue travel privileges, as described in the summary below.

Income Benefits	<p>If survivor benefits are payable under the D&S Plan and/or the Retirement Plan, benefits will be set up automatically for payment effective with the first day of the month following the employee’s death. Generally, if a properly completed Income Eligibility Statement is received by the 5th day of the month, benefit payments (including any applicable retroactive payments) may begin the first of the following month.</p> <p>Note: Receipt of a completed Income Eligibility Statement by the 5th day of the month does not guarantee that benefits will be paid on the first day of the following month in all situations as other possible processing requirements may apply.</p> <p>If the Income Eligibility Statement is not received by the 5th day of the month or processing delays occur, payments will generally begin the first day of the second following month, with retroactive payments payable. For example, if the forms are received on the 20th of October for a payment that was effective October 1, then the first payment will include both the November 1 payment and the retroactive October payment.</p>
Health Insurance	<p>Information regarding health insurance will be sent under separate cover one to two weeks after the employee’s death is reported. The survivor will need to call the ESC once he or she receives the notification to complete enrollment over the phone, to continue coverage if desired.</p>
Life Insurance	<p>Basic and Optional Life insurance are administered by MetLife, while Group Accident insurance is administered by The Hartford. Please see chart on the following page for contact information for both companies.</p>
Travel Privileges	<p>Pass riders continue to be active in the employee’s travel account for 30 days after the employee’s death is reported. However, buddy passes are suspended immediately and can be refunded by calling 1-800 MY DELTA (1-800-693-3582), Monday through Friday, 8:00 a.m. – 5:00 p.m. Eastern Time, except holidays.</p>

Important Notes:

- All benefits under the employee (including health insurance) will cease once the employee’s death is reported
- Once the spouse or domestic partner/same-sex spouse and/or dependent children are determined to be eligible survivors, any benefits due will be retroactive to the date of death
- The employee’s domestic partner/same-sex spouse may be recognized under the D&S Plan as an eligible survivor, but not under the Retirement Plan

Important Telephone Numbers

EMPLOYEE SERVICE CENTER (ESC) 8:00 a.m. – 5:00 p.m. Eastern Time, Monday – Friday, except holidays International callers	1-800 MY DELTA (800-693-3582) (404-677-8000)
UNITED HEALTHCARE	877-683-8555
LIFE INSURANCE MetLife Claim Service Center	866-939-7409
ACCIDENT INSURANCE The Hartford	800-850-9146
DELTA COMMUNITY CREDIT UNION Atlanta Outside Atlanta	404-715-4725 800-544-3328
VOLUNTARY PERSONAL INSURANCE Travelers	877-754-0476
FAMILY-CARE SAVINGS PLAN / 401(k) PILOT DEFINED CONTRIBUTION PLAN (DC PLAN) Fidelity Investments P.O. Box 9029 Boston, MA 02205	800-554-0262
EMPLOYEE ASSISTANCE PROGRAMS LIFE TRANSITIONS	800-980-6938