



For State Executive Branch Employees- **GUIDE for Death of Spouse/Dependent**

This GUIDE is intended as a checklist of offices you need to contact and some important forms you may need to file when your spouse or dependent dies. It does not constitute a binding legal document or contract. It lists only some of the benefits that may be available. State benefits vary by type of employment appointment and collective bargaining agreement and are subject to change. It does not supersede laws, rules, collective bargaining agreements, executive orders, policies and procedures, or benefit plan documents pertaining to the benefits covered, and is subject to change. For more information, contact your departmental Human Resources Office (HRO) designee or refer to the applicable rules, laws, collective bargaining agreements, executive orders, or benefit plan documents.

Forms You May Need to Complete		Agencies You May Need to Contact
State of Hawai'i Department of Taxation Federal U.S. Treasury Internal Revenue Service (IRS)	<p><i>HW-4 Employee's Withholding Allowance & Status Certificate</i> - State of Hawai'i, Department of Taxation</p> <p><i>W-4 Employee's Withholding Certificate</i>- U.S. Treasury, Internal Revenue Service (IRS)</p> <p>Review your current tax withholdings and exemptions. If you need to make changes, you may want to consult a tax professional. When you make a change to your tax withholding choices, your changes will become effective on the next pay period the State processes your pay.</p>	<p>Contact Information for: <i>State of Hawai'i Department of Taxation</i> 1-800-222-3229 or 808-587-4242 Website: www.tax.hawaii.gov/forms/</p> <p><i>Federal Internal Revenue Service (IRS):</i> 1-844-545-5640 (Toll-Free) or 1-800-829-1040 Website: www.irs.gov/Forms-&-Pubs</p> <p>HIP employee self-service portal: https://ags.hawaii.gov/hip/manage-your-tax-withholding-choices/</p>
State of Hawai'i Department of Accounting and General Services (DAGS)	<p><i>SA Form D-90 Employee's Designation of Beneficiary</i></p> <p>This form allows the beneficiary(ies) of an employee to be paid all accumulated vacation pay and all earned and unpaid wages due at the time of the employee's death. If a beneficiary statement is not completed, then payment of any unpaid wages and leave is made to the employee's estate. This beneficiary designation is for payroll purposes only.</p> <p>Review current designation(s) and, if you need to make changes, submit revisions to your HRO designee or log into the Hawai'i Information Portal (HIP) to make these changes in the employee self-service portal. Your changes become effective immediately and your most recent designation of beneficiaries in HIP is what the State of Hawai'i will use to pay your beneficiaries in the event you pass away. Entering your beneficiary information in HIP, or making changes, will supersede any paper payroll beneficiary forms that you completed previously.</p>	<p>You may request SA Form D-90 Employee's Designation of Beneficiary from your HRO designee.</p> <p>SA Form D-90 is available on website: https://ags.hawaii.gov/accounting/state-accounting-forms/</p> <p>HIP website: https://execsso.hip.hawaii.gov</p> <p>HIP employee self-service portal: https://ags.hawaii.gov/hip/manage-your-payroll-beneficiaries</p>

<p>State of Hawai'i Employees' Retirement System (ERS)</p>	<p><i>Hybrid and Contributory plan members- ERS Form 1-A, Contributory/Hybrid Plan Designation of Beneficiary</i></p> <p>Send completed ERS Form 1-A to: Employees' Retirement System City Financial Tower, 201 Merchant Street, Suite 1400 Honolulu, Hawai'i 96813-2980* *UH employees: submit Form 1-A directly to your HRO designee</p> <p>Noncontributory plan members - no beneficiary designation form is required as active death benefits are payable to the surviving spouse and dependent children by law.</p>	<p>Contact information for ERS Oahu: 808-586-1735</p> <p>Neighbor island members may call the office in their county: Hawai'i: 808-974-4077, 808-974-4076 or 808-974-4074 Kaua'i: 808-274-3010, 808-274-3011 Maui/Moloka'i/Lāna'i: 808-984-8181, 808-984-8282</p> <p>Website: https://ers.ehawaii.gov/resources/all-forms</p>
<p>Hawai'i Employer-Union Health Benefits Trust Fund (EUTF)</p>	<p><i>EUTF Form EC-1/EC-1H (HSTA VB members only) Enrollment Form for Active Employees</i></p> <p>To terminate your deceased dependent from your EUTF health benefit plans, submit a completed EC-1 form and a copy of the certificate of death to your HRO designee.</p> <p><i>PCP-2 Election Change Form</i> If you are enrolled in the Premium Conversion Plan (PCP), complete a PCP-2 form within 90 days of spouse's/dependents death and submit to your HRO designee. The change becomes effective on a prospective basis from the date employer receives the form.</p>	<p>EUTF 201 Merchant Street, Suite 1700 Honolulu, Hawai'i 96813 808-586-7390 or 1-800-295-0089</p> <p>Website: www.eutf.hawaii.gov</p> <p>Forms: EC-1/EC-1H Enrollment Form: www.eutf.hawaii.gov/eutf-forms/ PCP-2 Election Change Form: https://dhrd.hawaii.gov/state-employees/employee-benefits/tax-savings-plan-benefits/</p>
<p>Securian Financial Group, Inc. Group Life Insurance</p>	<p><i>Group Term Life Insurance Beneficiary Designation Form</i></p> <p>If you need to change your beneficiary, download the Beneficiary Designation Form, complete, sign, date and return to Securian Life Insurance Company. Your designations are not valid until received and accepted by Securian.</p> <ul style="list-style-type: none"> • Fax: 1-651-665-4827 • Mail: 400 Robert Street North, St. Paul, MN 55101-2098 	<p>Securian Life 808-536-9890 or 1-877-291-8466</p> <p>Website: www.lifebenefits.com/eutf</p>
<p>Island Savings Plan (ISP) State Deferred Compensation Plan IRC 457(b)</p>	<p><i>Beneficiary Designation</i> If you are enrolled in the Island Savings Plan and wish to elect/change your primary or secondary beneficiary, you may either update your account online or call the Island Savings Plan.</p> <p>If you are a designated beneficiary of a deceased employee who also worked for the State of Hawai'i, please contact the Island Savings Plan to discuss options available to you.</p>	<p>Contact information for designating a beneficiary: Island Savings Plan 1-888-71-ALOHA (1-888-712-5642) Press "1" to speak with a Call Center Representative Press "2" to contact a local ISP Retirement Plan Advisor 1100 Alakea Street, Suite 1550 Honolulu, Hawai'i 96813 Website: www.empower.com/islandsavings</p> <p>If you would like to schedule a counseling session with an Empower Retirement Plan Advisor, go to the Plan's website and click on the <i>Meet Your Retirement Plan Advisors</i> section.</p>

National Benefit Services (NBS) Tax-Sheltered Annuity (TSA) Plan 403(b) Applicable to employees of: Department of Education (DOE) University of Hawai'i (UH)	If you are enrolled in a TSA, and wish to change your beneficiary designation, please contact your financial advisor or investment provider for instructions.	Contact information for National Benefit Services (NBS): 1-800-274-0503, extension #504 FAX: 1-800-597-8206 Websites: <i>For UH employees:</i> www.nbsbenefits.com/uh403b <i>For DOE employees:</i> www.hawaiidoee403b.com
National Benefit Services (NBS) <i>Island Flex</i> Flexible Spending Accounts (FSA) Plan	If you are enrolled in the <i>Island Flex</i> Plan and wish to change your designated amount for your flexible spending account, you may do so within 90 days of your spouse/dependent's death. Contact National Benefit Services (NBS). The change will become effective on a prospective basis from the receipt date of your request.	National Benefit Services (NBS): Toll-free: 1-855-399-3035 (option 2) or local office at 808-465-2284 Fax: 808-465-3712 Email: islandflex@nbsbenefits.com Website: www.nbsbenefits.com/islandflex
Comprehensive Financial Planning, Inc. Part-time, Temporary & Seasonal (PTS) Deferred Compensation Plan	If you are enrolled in the PTS Plan and wish to change your beneficiary, call Comprehensive Financial Planning, Inc., the local servicing agent for the PTS Plan.	Comprehensive Financial Planning, Inc.: 808-596-7006 or (Neighbor islands) call toll free at 1-800-600-7167
If your Spouse was a Veteran	Contact the Veteran's Administration to find out if any benefits are available.	Contact Veterans Benefits Administration: Honolulu Regional Benefit Office 459 Patterson Road, E-Wing, Room 2A100C Honolulu, HI 96819-1522 1-800-827-1000 Website: www.benefits.va.gov/honolulu
If your Spouse was Retired Military	Contact the appropriate military branch office, including the National Guard, because your family may be eligible for assistance. A Survivor's Assistance Officer will help you during this time of need and help you apply for the various benefits for which you may be eligible.	
If your Spouse earned enough Social Security credits	Contact Social Security Administration for information on social security benefits you may be eligible for.	Contact Social Security Administration: Prince Kuhio Federal Building 300 Ala Moana Blvd., Rm. 1-114 Honolulu, HI 96850 1-800-772-1213 Website: www.ssofficelocation.com/honolulu
If your Spouse was a member of an employee organization (union)	Contact the appropriate employee organization to find out if you are covered by that organization's insurance plan.	

<p>If you need to have Spouse's final tax return filed</p>	<p>Contact the Internal Revenue Service/Hawai'i State Tax Office for information and/or assistance.</p>	<p><i>Internal Revenue Service (IRS):</i> 1-844-545-5640 or 1-800-829-1040 Website: www.irs.gov</p> <p><i>State of Hawai'i Department of Taxation:</i> 1-800-222-3229 or 808-587-4242 Website: www.tax.hawaii.gov</p>
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For more information, contact your **Departmental Human Resources Office**

Accounting and General Services	808-586-0369
Agriculture & Biosecurity	808-973-9481
Attorney General	808-586-1236
Budget and Finance	808-586-1598
Business, Economic Development and Tourism	808-586-2562
Commerce and Consumer Affairs	808-586-2838
Corrections and Rehabilitation	808-587-1221
Defense	808-369-3580
Education- Employee Benefits Unit	808-441-8311
Governor's Office	808-586-0718
Hawai'i State Public Library System	808-831-6860
Hawaiian Homelands	808-620-9540
Health	808-586-4512
Human Resources Development	808-587-1150
Human Services	808-586-5003
Labor and Industrial Relations	808-586-9043
Land and Natural Resources	808-587-0180
Law Enforcement	808-587-5015
Lieutenant Governor's Office	808-586-0255
Taxation	808-587-1503
Transportation	
-Administration	808-587-4556
-Highways	808-587-2230
-Airports	808-838-8614
-Harbors	808-587-1933
University of Hawai'i	808-956-8458