

Livewell Southwest

Death in Service Policy

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Notice to staff using a paper copy of this guidance.

The policies and procedures page of LSW Sharepoint holds the most recent version of this document and staff must ensure that they are using the most recent guidance.

Author: People and Professionalism

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Document review history

Version No.	Type of change	Date	Originator of change (Name and job title)	Description of change
1.1	Drafted	April 2020	HR Workforce Policy Group	New Policy
1.2	Update	May 2020	HR	Updating links in Appendix F
1.3	Update	September 2023	HR	Adding Death in Service Notification Form and amending appendices and minor updates from policy ratification group.
1.4	Update	April 2024	HR	Removal of reference to DHSE as linked to covid times

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Death in Service Policy

1 Introduction

- 1.1 This policy provides the expected actions required in the event of an employee's death in service to make the situation as uncomplicated as possible.

2 Purpose

- 2.1 The purpose of this policy is to support managers in the sad event of an employee's death to ensure the situation is handled sensitively and effectively at a time of distress.

3 Duties & Responsibilities

- 3.1 The **Chief Executive** is responsible for sending a letter of condolence on behalf of the organisation. Where the death in service occurs in the workplace the Chief Executive has overall responsibility for ensuring the appropriate incident procedures are implemented.
- 3.2 **Directors** are responsible for ensuring the appropriate and sensitive handling of an employee's death in service. They also have responsibility for ensuring the appropriate incident procedures are implemented.
- 3.3 **Line Managers** are responsible for ensuring they inform the HR and Payroll Departments as soon as possible completing the necessary processes. It is also their responsibility to notify colleagues in a sensitive way
- 3.4 The **Human Resources Department** will support the line manager in ensuring the necessary processes are followed.
- 3.5 The **Payroll and Pensions Officer** will notify Shared Business Services Payroll provider and process the necessary information.

4 Procedure

- 4.1 The Chief Executive will ensure that appropriate condolences are expressed at a senior level from the organisation to the next of kin and deceased member of staff's team. However, careful consideration will be given to the appropriateness and circumstances surrounding the individual case. The HR Department will initiate this letter as per Appendix B.
- 4.2 The line manager is likely to be the first person to be advised when a member of staff dies; therefore, it is the manager's responsibility to inform the Payroll and Pensions Officer and the Human Resources People Team as soon as possible if this occurs. The manager will need to complete the Leavers Form and Death in

Service Notification Form, Appendix E. This form should then be sent to the Payroll and Pensions Officer who will process the form and forward to Payroll Shared Services to ensure this information is updated on the Electronic Staff Record (ESR). This will prevent correspondence such as the staff survey being sent out to the deceased staff member's address. The manager should also arrange for the deceased person's email account to be assigned to them so that messages can be dealt with in an appropriate way.

4.3 It is the line manager's responsibility to notify colleagues in a sensitive way. It is accepted that a death of a colleague has a major impact on the team. Managers should ensure appropriate support is put in place / offered to colleagues through this difficult and emotional time. Examples of this may include but not exhaustive:

- Support from the staff counselling and support service (EAP)
- Spiritual and pastoral care
- Support from the Occupational Health Service
- Trauma Risk Management (TRIM)
- One to one support
- It's all About You – Workplace Wellbeing
<http://pchnet.derriford.phnt.swest.nhs.uk/Home/ItsAllAboutYou.aspx>

4.4 The Line Manager may also contact the next of kin in a sensitive way to find out if they are happy for members of staff to attend the funeral and to ask if flowers can be sent.

4.5 When advised of the death of a member of staff the Human Resource People Team will contact the Payroll and Pensions Officer immediately to notify them of the death of the staff member. They will inform the manager of the next of kin's name and address so that the manager may liaise directly with them. A second letter will be sent within one week of the first letter to the next of kin. The letter will focus on the practical arrangements regarding payment of salary with a request for details of the executors of the estate. An example letter is given at (Appendix D) however; careful consideration should be given to the wording of the letter. The coordination and responsibility for this letter will be the deceased employee's line manager in liaison with HR.

4.6 Payroll Shared Services are responsible for liaising with the Pensions Department for those colleagues within the NHS Pension scheme or Local Government Pension. Where the deceased colleague was a member of the Scottish Widows Pension scheme, the information will be passed directly to Scottish Widows who will make direct contact with the next of kin to proceed with the process.

4.7 Salary Sacrifice Schemes - where a member of staff has an agreement where payment for goods, i.e., Cycle to Work Scheme, or services, i.e., Childcare

Vouchers, is taken directly from their salary, the agreement will cease if the member of staff dies. No further payments will be deducted from their salary. The outcome of what will happen to any goods obtained in this way will be dependent on the contract signed at the time of agreeing to take part in the scheme.

- 4.8 Sensitivity must be displayed at all times when dealing with the death of a member of staff. Relatives and colleagues must be treated with courtesy and respect. It is recognised that this is a difficult time for colleagues and access to the Employee Assistance Programme will be ensured. The Manager should follow the Manager's Checklist Appendix A to guide them through the process.
- 4.9 The relevant Director / Communications will be responsible for cascading notification of a death in service by e mail to affected managers and colleagues in a sensitive manner.
- 4.10 Where there is likely to be press interest in the death of an employee, the lead Director with support from communications will liaise to agree a strategy for dealing with media interest.

5 Death in pensionable membership information

- 5.1 The NHS Pension Scheme has issued guidance providing a general overview of the benefits payable under each section of the scheme, but we would strongly advise seeking further advice from NHS Pensions for clarity around individual circumstances.

<https://www.nhsemployers.org/-/media/Employers/Publications/Reward/Death-in-pensionable-membership-April-2020.pdf>

- 5.2 If you are a member of a different scheme we would strongly advise seeking further advice from your Pension provider for clarity around individual circumstances.

Local Government Scheme (Peninsula Pensions):

<https://www.peninsulapensions.org.uk/lqps-member/>

Scottish Widows:

https://www.scottishwidows.co.uk/contact_us/individual_customers/pensions.html

6 Training Implications

- 6.1 Any necessary training will be identified and implemented as appropriate.

7 Monitoring compliance

7.1 This policy will be monitored through the HR Workforce Policy Group.

All policies are required to be electronically signed by the Lead Director. Proof of the electronic signature is stored in the policies database.

The Lead Director approves this document and any attached appendices. For operational policies this will be the Locality Manager.

The Executive signature is subject to the understanding that the policy owner has followed the organisation process for policy Ratification.

Signed: Dawn Slater, Director of People and Professionalism

Date: 25th January 2024

Appendix A - Managers Checklist

1.	<p>As soon as notified of the death of a member of staff contact:</p> <ol style="list-style-type: none"> 1. Human Resource People Team 2. Payroll and Pensions Officer 	Tick as appropriate:
2	<p>Complete the Employee Leavers Form and Death in Service Notification Form, Appendix E and send to Payroll and Pensions Officer at pchcic.esradminpct@nhs.net</p> <p>The manager will need to state whether the employee has any annual leave entitlement accrued. If the employee owes any time, i.e. has taken more annual leave than their entitlement to date, the organisation will not claim this back.</p>	
3	<p>Notify staff in a sensitive way. If appropriate, offer them details of the Employee Assistance Programme</p> <p>http://pchnet.derriford.phnt.swest.nhs.uk/StaffCentral/OccupationalHealth-TeamPrevent.aspx</p>	
4	<p>Chief Executive to send letter of condolence to next of kin – sample letter shown in Appendix B.</p>	
5	<p>Contact next of kin – Manager to contact next of kin regarding admin arrangements – sample letter in Appendix C. Also find out if they are happy for staff to attend the funeral and whether it will be acceptable for flowers to be sent or if they would prefer a charitable donation.</p>	
6	<p>Arrange to return any personal possessions to the next of kin. Arrange for the return of any laptops, mobile phones, passes, smartcard and any other equipment belonging to the organisation</p>	

Appendix B - Chief Executive Letter to Next of Kin

Name of next of kin
Address

Dear [Next of kin]

I was truly sorry to hear of the loss of [employee's name]. He/she will be missed by everyone in the [xxxxx department].

Manager may insert a personal paragraph in the letter at this point.

I know that all [employee's name] colleagues would like me to pass on their deepest sympathies at this very difficult time.

If there is anything I can do to help you further at this time, please do not hesitate to contact me on [telephone number].

Yours sincerely

[Name]
[Job title]

Appendix C – Manager Letter to Next of Kin

Name of next of kin
Address

.....

Date: XX/XX/XXXX

Dear (insert next of kin)

I was deeply saddened to hear of (employee's name)'s death. I know that (employee's name) was a dedicated and well-respected member of the team and that all (our / employee's name as appropriate) colleagues would like to convey their deepest sympathies at this difficult time for you and your family (or similarly worded paragraph).

I am sorry to intrude at this difficult time but there are a number of administrative matters that unfortunately/regrettably need to be addressed. Obviously, we will be doing all that can be done to minimise the burden to you at this time. The organisation's payroll department is completing the necessary paperwork for any monies owing. All cheques will be made payable to (employee's first name's estate). Accordingly it would be helpful if you or another family member could provide me with the name and address of the executors.

Please contact me on (telephone number) if there is anything that I can do to help, or if there is anything in this letter you would like to discuss.

Yours sincerely

Manager

cc People Business Partner
Payroll and Pensions Officer

Appendix D – Manager Letter to Next of Kin - requesting consent

Name of next of kin
Address

Livewell Southwest
Enter your address here

T. (Area code) phone number
E. name.name@nhs.net

www.livewellsouthwest.co.uk

Date: XX/XX/XXXX

Dear (insert next of kin)

I was deeply saddened to hear of (employee's name)'s death. I know that (employee's name) was a dedicated and well-respected member of the team and that all (our / employee's name as appropriate) colleagues would like to convey their deepest sympathies at this difficult time for you and your family (or similarly worded paragraph).

I am sorry to intrude at this difficult time but there are a number of administrative matters that unfortunately/regrettably need to be addressed. Obviously, we will be doing all that can be done to minimise the burden to you at this time. The organisation's payroll department is completing the necessary paperwork for any monies owing. All cheques will be made payable to (employee's first name's estate). Accordingly it would be helpful if you or another family member could provide me with the name and address of the executors.

Please contact me on (telephone number) if there is anything that I can do to help, or if there is anything in this letter you would like to discuss.

Yours sincerely

Manager

cc People Business Partner
Payroll and Pensions Officer

LSW is proud to be a smokefree organisation to promote health and wellbeing. If you do smoke, vaping is possible outdoors on all sites. If you would like support to quit, please speak with your healthcare professional or contact One You Plymouth on 01752 437177

Appendix E – Death in Service Notification Form



Shared Business Services

DEATH IN SERVICE NOTIFICATION FORM

Please notify payroll separately of the death, so they can process any payments for outstanding salary and annual leave.

Name	
Assignment Number	
Date of Death	
Was their employment on the Bank? YES/NO If Yes, were they scheduled to work in the week of their death?	
Number of hours outstanding annual leave owed; this needs to be known to enable forms to be issued.	
What was the employee's marital status: - Married, Single, Divorced, Widowed, or formed a Civil Partnership	
If married, in a civil partnership, or had a long-term partner*, please provide the name, address, email address and telephone number of the spouse/partner	
If not married, in a long-term relationship or civil partnership, please provide the name, address, email address and telephone phone number and the relationship to the deceased or the person dealing with the estate.	
Please confirm who notified you of the death if different to above and provide the name, address, email address and telephone phone number.	
Are there any dependent children YES / NO if known	

Please return this form to SBS-S.Pensions@nhs.net

Please ensure the notification form is fully completed and accurate before returning to us as any amendments required will affect the benefits payable, if this is revised once notification has been provided to NHS Pensions.

* to claim as a long-term partner, they must have been living together for at least 2 years and be financially interdependent. NHS Pensions will assess whether they qualify for spouse's benefits before payment is made.¹

APPENDIX F – Health and Wellbeing Resources

Supporting colleagues:

<https://www.england.nhs.uk/supporting-our-nhs-people/>

[Welcome to the HR People Hub \(sharepoint.com\)](#)
