

Death in Service Guidance

1.0 Purpose

1.1 This guidance describes the procedure that should be followed and the practical issues that should be considered following the death of an employee. The guidance is also designed to ensure that NHS Lanarkshire takes a consistent approach to assisting line managers to deal with this sensitive matter.

2.0 Scope

This guidance applies to all employees of NHS Lanarkshire*.

*Staff Bank (workers) – refer to SPPA Death in Service Guidance [SPPA Death in Service](#)

3.0 Duties and Responsibilities

3.1 Chief Executive

- Ensures appropriate condolences are expressed at a senior level from NHS Lanarkshire to the next of kin/family.
- Issues condolence letter to next of kin/family.

3.2 General Manager/Director of Hospital Services

- Ensures all calls and correspondence relating to the death in service are dealt with in a sensitive and confidential manner.
- Support Line Manager and signpost to support services as required.

3.3 Line Manager

- Notify payroll immediately to ensure no overpayment of salary ([Payroll email](#)).
- Notifies the relevant leads such as the Chief Executive's PA and HR that a death in service has occurred.
- Complete termination transaction on eESS and update SSTs.
- If deceased employee was a member in the superannuation scheme, supports NoK/family to complete relevant SPPA documentation in conjunction with HR ([SPPA](#)).
- Where the deceased employee has been attending Salus Occupational Health, inform them of the death of the employee.
- Ensures appropriate support is in place and signpost to wellbeing website for affected colleagues including Occupational Health and Staff Care and wellbeing services.
- Ensures all calls and correspondence relating to the death in service are dealt with in a sensitive and confidential manner.
- If the deceased employee was a member of a trade union, inform their family that death benefits may be available from the relevant trade union.
- Drafts correspondence of condolence and subsequent letters as outlined in the appendices. Forward condolence letter to Chief Executive for them to issue.
- Responds appropriately to the requests of the next of kin and organises tributes as appropriate.
- If requested visit the deceased's family, at which the HR Representative can accompany/support manager, as appropriate.
- Decides how patients of the deceased should be informed if appropriate.
- Oversees the return of personal property and the collection of NHS Lanarkshire property from the deceased employee's next of kin / family.
- Arranges the removal of the deceased employee's details from all NHS Lanarkshire systems e.g. trackcare, global email, directorate / team distribution lists etc.

3.4 Human Resources representative

- Ensures all calls and correspondence relating to the death in service are dealt with in a confidential and sensitive manner.
- Inform HRM to enable Finance/HR spreadsheet to be updated with deceased employee details.

- Request final salary amount and confirmation if deceased employee was a member of SPPA (currently or previously) from payroll.

*Some employees will have a pension through a Scot Gov scheme, NEST. NHSL does not link with them and the Next of Kin/family need to contact them direct. Link to NEST website [NEST Death Benefits Information](#). Payroll will confirm if deceased employee is in this scheme. HR to provide manager with website details to allow them to inform the next of kin/family.

- Confirm with payroll if initial 6-month pension payment is payable to the deceased spouse/partner in line with SPPA processes.
- Signpost or provide line manager with appropriate paperwork, i.e. condolence letter, indemnity form, SPPA forms.
- Support manager with deceased next of kin in completion of the forms as required.
- Scan and email completed SPPA and Indemnity forms to payroll and/or cashiers' office.
- Support line manager, when requested, at home visits with the deceased employee's next of kin to arrange completion of payroll/pension paperwork.
- Retain copy of all paperwork in the HR Cases folder in line with HR Records Retention.
- Update Grid/case management system appropriately and timeously.

3.5 Payroll Department

- Ensures all calls and correspondence relating to the death in service are dealt with promptly, in a confidential and sensitive manner.
- Ensures that payments are stopped upon notification that there has been a death in service until the correct monies owing can be calculated.
- Calculate monies owed and advise HR Representative to allow correct indemnity form/arrangements to be followed.
- Confirm with HR Representative if deceased employee was a member of SPPA (currently or previously) or NEST.
- Provide advice/support to Manager and/or HR Representative as required.
- Once notified, ensure the timely administration of salary and, where appropriate, pension administration.
- If required, liaises with key leads: line manager, designated HR representative, Scottish Public Pensions Agency (SPPA), next of kin/estate of the deceased employee regarding their final pay and pension arrangements.
- Where appropriate ensure initial 6-month pension payment is made to spouse/partner in line with SPPA conditions.

3.6 Communications

- Make arrangements for any employee obituary and press releases as appropriate.

4.0 Procedure following a death in service

4.1 When a death in service occurs, the deceased employee's line manager must inform the relevant Director, Chief Executive's office, Communications and Payroll departments and raise a call via HR Service Now, requesting a HR representative to be assigned.

4.2 The line manager shall make available the next of kin details or, in the absence of next of kin, emergency contact details to the relevant manager/HR.

4.3 The Chief Executive will send a letter of condolence to the next of kin, drafted by the line manager. An example is given at (Appendix 1). However, careful consideration will be given to the appropriateness and circumstances surrounding the individual case.

4.4 The relevant Director or member of the Communications department will be responsible for cascading notification of a death in service by email to affected NHS Lanarkshire managers and colleagues in a sensitive manner.

4.5 Where there is likely to be press interest in the death of an employee, the Director, with support from the Communications department will liaise to agree a strategy for dealing with media interest.

4.6 The death of a colleague can have a significant impact on a team and the team's manager. Managers should ensure appropriate support is put in place/offered to colleagues through what is a difficult and emotional time. It is acknowledged that managers will find dealing with the death of a team member stressful and they should not hesitate to access support for themselves during this time. This can include facilitated time for employee to speak to and support each other, should this be required. A list of staff well-being services included in appendix 4.

4.7 Where salary payment and pension arrangements have not already been addressed, a second letter will be sent within one week of the letter from the Chief Executive to the next of kin. The letter will focus on the practical arrangements regarding payment of salary/pension. An example letter is provided at Appendix 2 and careful consideration should be given to its wording. The coordination of this letter is the responsibility of the deceased employee's line manager, in conjunction with the designated HR representative.

4.8 The manager is responsible for dealing sensitively with the return of personal belongings to the next of kin.

4.9 The manager is responsible for ensuring the return of NHS Lanarkshire items e.g. NHS Lanarkshire ID badge etc. Relatives / next of kin should not be subject to undue pressure immediately after the death to return such items.

5.0 Completion of a leaver's transaction via eESS

5.1 When a death in service occurs, the deceased employee's line manager is responsible for completing a leaver form via the eESS system as soon as possible.

5.2 To prevent an exit interview questionnaire being issued and to prevent unnecessary communication with the next of kin, the eESS leaver's transaction must state "Death in Service".

5.3 The eESS leaver's transaction should include any outstanding annual leave owed to the deceased employee.

6.0 Payment of Final Salary / Pension Arrangements

6.1 Payroll cannot stop any payment which are pending until they have been advised of a death in service.

It is essential that payroll are informed immediately, as the deceased employees bank will freeze their account. The executor or administrator would then need to apply for any money to be released – the time this takes will vary depending on the amount of money in the account. Each bank will have their own guidelines for monetary amounts and release times.

6.2 By law, NHS Lanarkshire may only discuss payment of salary with the next of kin and executors of the deceased employee's estate.

6.3 Payroll will calculate any final payment due. Dependent on the circumstances, final salary will either be paid to the next of kin or to the estate.

6.4 Where the deceased employee was a member of the NHS pension scheme, their manager, with support from the HR Representative (if required) will liaise as appropriate with the executors, next of kin and the SPPA if appropriate. The deceased employee's pension and dependant's application forms shall be processed in a timely manner by the payroll department for onward transmission to SPPA.

6.5 SPPA Short-term survivor pensions: An initial survivor pension (spouse, civil partner or qualifying partner) is paid by NHSL for a period of six months from date of death, at a rate equivalent to the deceased employees monthly pensionable pay/salary that's in payment at time of death. A short-term pension of 3 or 6 months may be payable to a child if there's no adult dependant's pension payable or if the child is not dependent on the surviving spouse.

Where there is an entitlement to payment of the first 6 months' pension by NHSL, payroll will advise and ensure this payment is made in accordance with SPPA guidance/ process.

7.0 Attendance of NHS Lanarkshire representative at deceased employee's funeral

7.1 In the event of a death in service, NHS Lanarkshire would wish to show support to the next of kin/family and the deceased employee's colleagues. Where appropriate it may be deemed appropriate that a NHS Lanarkshire director or senior manager should attend the deceased employee's funeral to represent NHS Lanarkshire. Line managers should discuss this with the family and will assess whether this representation is appropriate.

7.2 Colleagues may also wish to attend to pay their respects. Taking into consideration the needs of the service, this should be accommodated and coordinated by the line manager.

Appendices:

Appendix 1 Condolence Letter Template from Chief Executive

Appendix 2 Follow up Letter from Line Manager

Appendix 3 Death in Service Flow Chart

Appendix 4 Wellbeing and Department Links

Example letter

Personal – Addressee only
Name of next of kin
Address

Date

Dear

I am sorry to be writing to you under such sad circumstances but I would like to formally convey on behalf of NHS Lanarkshire my most sincere condolences on the death of your [wife/husband/partner]. [first name of employee] was a valued member of staff and a well-respected colleague whose contribution towards the work of NHS Lanarkshire was much appreciated.

The loss of a [family member/loved one] is always difficult and I would like to offer my support to you in whatever way I can. Do not hesitate to contact me via email or by telephone if there is anything I can do to assist and support you during this sad time.

There are a number of administrative tasks that will eventually need to be completed but I would stress that these are not urgent and we would not wish to intrude inappropriately or to add to your burden at the moment. [name of line manager] will contact you in due course to progress this.

With kind regards.

Yours sincerely

Chief Executive

cc Line Manager

Example letter

Personal – Addressee only
Name of next of kin
Address

Date

Dear (Name of next of kin)

I was saddened to hear of [employee’s first name] death and I would wish to offer my condolences.

Further to the Chief Executive’s letter, I attach some necessary paperwork that requires to be completed to allow payment of [employee’s first name] final salary [and pension]. It would be helpful if you could complete and return them to [HR rep, address] when you feel ready and able to do so.

Option 1

[Should you require any assistance in completing these do not hesitate to contact [HR Contact] via e-mail on [xxxxx] or telephone on [xxxxx]]

Option 2

Following your/our discussion with [name of line manager] a home visit/meeting has been arranged for [xxx] to discuss and progress pay/pension application and assist in any other way we can.

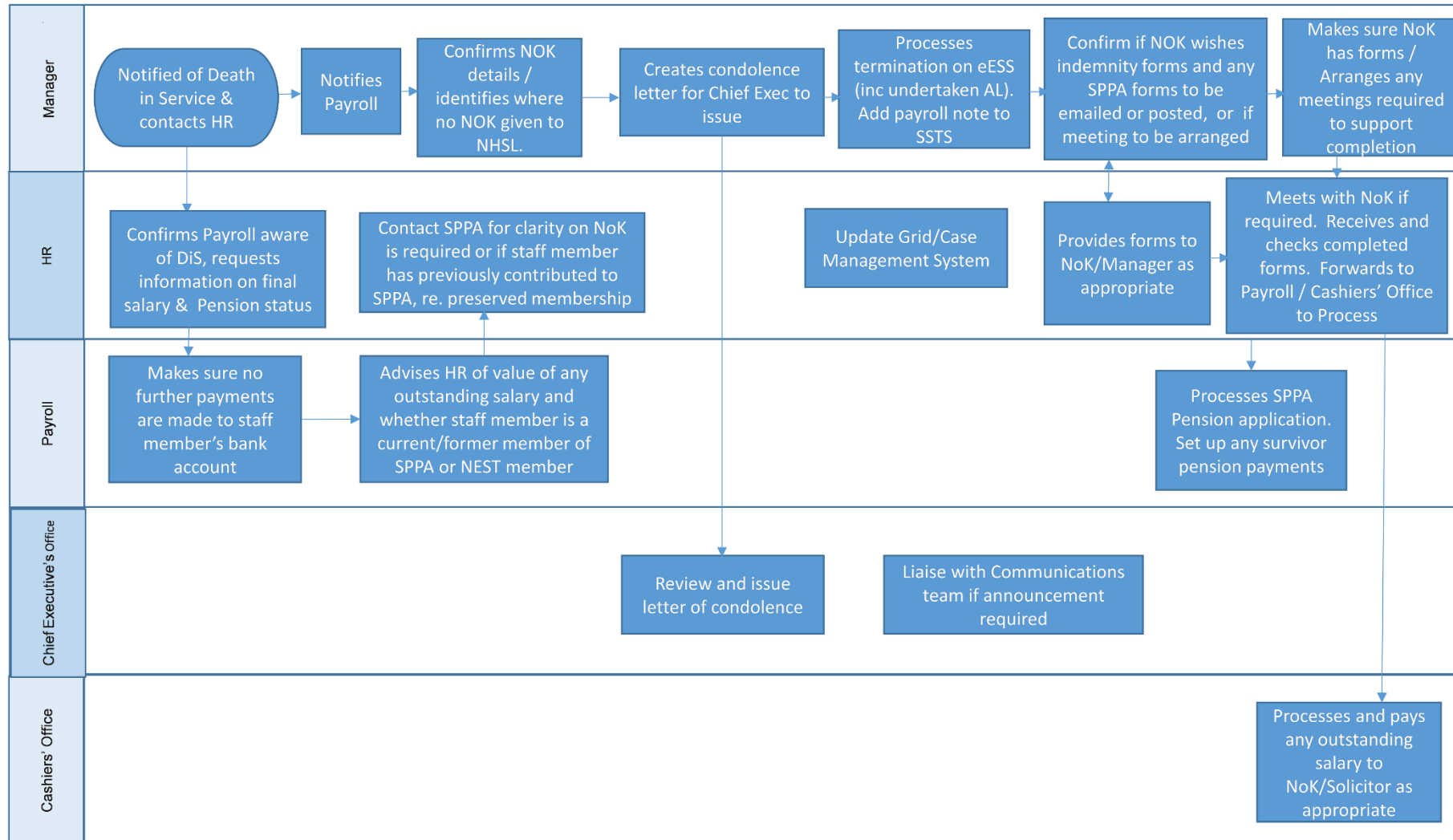
Please do not hesitate to contact me via email on the above address or on my mobile number if there is anything that I can do to help.

Yours sincerely

Line Manager/Service Manager/Senior Nurse
Title

cc. HR Representative
personal file

Death in Service Flow Chart



References/Links:

National Employment Saving Trust: [NEST Death Benefits Information](#)

Once for Scotland Attendance Policy: [NHSS Attendance Policy](#)

 Scottish Public
Pensions Agency
Bùthannan Pàrsonnan
Indeibh nan Ìobair <https://pensions.gov.scot/nhs>

NHSL payroll contact details: epayroll.lanarkshire@lanarkshire.scot.nhs.uk

Salus OH: [Salus Occupational Health Mental Health & Wellbeing](#)

Confidential counselling: <https://www.thetalkingrooms.com/self-referral/>

Your health matters: <https://www.nhslanarkshire.scot.nhs.uk/your-health-matters/>

Lanarkshire Mind Matters: <https://www.lanarkshiremindmatters.scot.nhs.uk/>

24-hour staff care and well-being support line offers psychological support to all staff - 01698 752000

National Wellbeing Hub: <https://wellbeinghub.scot/>

Stress and Mental Wellbeing Policy including the Stress Risk Assessment -
<https://www.nhslanarkshire.scot.nhs.uk/corporate-policies/human-resources-policy/>

Cruise Bereavement: <https://www.crusescotland.org.uk/>

Dying Matters: <http://www.help.dyingmatters.org/>

[HR Service Now](#)