

Reference Number: UHB 197 Version Number: 3	Date of Next Review: 9 March 2025 Previous Trust/LHB Reference Number: N/A
DEATH IN SERVICE PROCEDURE	
Introduction and Aim Cardiff and Vale University Health Board (the UHB) is committed to employing the best possible standards in its duty of care to staff and in its employment practices. In the unfortunate event of a death in service, the UHB recognises the need to balance sensitivity with the practical need to administer pay arrangements during a difficult and emotional time for the next of kin. In addition, it is accepted that the death of a colleague has a major impact on the team. Managers should ensure that appropriate support is put into place/offered to colleagues through this difficult and emotional time.	
Objectives <ul style="list-style-type: none"> • To support managers in the sad event of an employee's death. It is essential that these situations are handled in both a sensitive and effective way to prevent any additional distress for relatives and colleagues. • To support managers to make this situation as uncomplicated as possible and to ensure that consistency is applied in all cases. As this process will not be the norm, this procedure acts as a guide on the steps to be taken and the responsibilities of managers and other staff involved. • To prevent the next of kin from additional distress, ensuring that they are treated in a respectful and sympathetic way, whilst also ensuring practicalities are dealt with. 	
Scope This procedure applies to all employees of the UHB.	
Equality and Health Impact Assessment	An Equality and Health Impact Assessment has been completed and found that there was no negative impact.
Documents to read alongside this Procedure	N/A
Accountable Executive or Clinical Board Director	Executive Director of People and Culture

Document Title: Death in Service Procedure	2 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
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Summary of reviews/amendments			
Version Number	Date Review Approved	Date Published	Summary of Amendments
1	August 2013		New procedure
1a	28.07.2016	02.08.2019	Updated to reflect new UHB template – no other changes made. Rolled forward
1b	09.11.2016	25.11.2016	Sections 1.2 and 2.2 amended to advise managers that overtaken annual leave should not be recorded on termination form
2	25.09.2019	08.10.2019	Rolled forward with no changes
3	09.03.2022	26.04.2022	<p>New section on Chaplaincy and Spiritual Care and Bereavement Team added.</p> <p>Greater emphasis on wellbeing and support throughout</p> <p>Suggested letter template attached as appendix</p>

Document Title: Death in Service Procedure	3 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

CONTENTS

1	Responsibilities	4
2	Process	6
3	Death at Work	8
4	Confidentiality	8
5	Salary Sacrifice Schemes	8
APPENDICES		
1	Proforma for Chair's Letter	9
2	Suggested Letter to Next of Kin	11

Document Title: Death in Service Procedure	4 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

1	Responsibilities
1.1	<p>Chair</p> <p>The Chair will ensure appropriate condolences are expressed at a senior level from the UHB to the next of kin and deceased member of staffs' team.</p>
1.2	<p>Line Manager</p> <p>The line manager is likely to be the first person to be advised when a member of staff dies; it is therefore the line manager's responsibility to notify key parties in a timely manner, including the relevant senior management, payroll and human resources.</p> <p>The line manager is also responsible for:</p> <ul style="list-style-type: none"> • Notifying colleagues in a sensitive way. Where appropriate, this can be done on a one by one basis. Any staff affected by the death of a colleague should be offered relevant support (e.g. Employee Wellbeing Service, Chaplain Service). • Completing the Chair's letter proforma (Appendix 1). This should be done as soon as possible to ensure that the Chair is able to contact the next of kin soon after the event. • Sending appropriate correspondence to the member of staff's next of kin as described in section 2.1 . • Responding appropriately to the requests of the next of kin, bearing in mind the need to be sensitive to any religious or cultural beliefs or practices. • Completing a termination form and forwarding to payroll as soon as possible. N.B. the Manager should not record any overtaken leave on the termination form. • Arranging for the member of staff's email account to be assigned to them so that messages can be dealt with in an appropriate way. • Ensuring that the deceased employee's details are removed from circulation lists, rotas etc. • In situations where there has been long term sickness, Occupational Health will need to be informed so that any appointments are cancelled and no further correspondence is sent. • Dealing sensitively with the return of personal belongings to the next of kin • Ensuring the return of UHB property e.g. keys, ID Badge etc. at an appropriate time. However, relatives or next of kin should not be pressured immediately after the death to return such items. • Advise the deceased employee's family that a "death benefit" may be payable if they were a member of a trade union/professional organisation. • Be sensitive to the fact that employees may also need support if a previous team member dies • Managers should be aware of pertinent anniversaries

Document Title: Death in Service Procedure	5 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

	Line Managers should be supported in this by the relevant Directorate Manager and Clinical Board Head of Workforce and OD as appropriate.
1.3	<p>Workforce and OD</p> <p>Advice on the process with regard to the administration of a death in service can be obtained from the HR Administration and Advisory Team.</p> <p>The Employee Wellbeing Service is able to offer support on various levels, including supporting, advising and providing assistance to the managers concerned in helping them to best support their staff. They can also meet with staff either individually or as a group to offer support in the first instance.</p> <p>Grief is a normal emotional reaction to loss, in many cases the most supportive actions in the immediate aftermath of a death is peer support – colleagues sharing their grief with colleagues – and not professional help. However, if a staff member feels that their grieving is prolonged or they feel that the intensity of their emotions has not reduced with time, they can refer themselves to the Employee Wellbeing Counselling Service.</p> <p>Alternatively if some aspect of the death may have left staff experiencing psychological trauma, the staff member can refer themselves to the Employee Wellbeing Service and be fast tracked for an assessment for the psychological trauma care pathway.</p> <p>The Occupational Health Service is also available for members of staff who feel they need support. This can be accessed either via a self-referral or by a managerial referral. Managers may need to consider this for long term support and advice.</p>
1.4	<p>Chaplaincy & Spiritual Care & Bereavement Team</p> <p>The Chaplaincy & Spiritual Care department can provide emotional support and pastoral care for staff. A Chaplain can meet with an individual or a group to assist in emotional wellbeing after the loss of a work colleague.</p> <p>A manager can approach the Chaplaincy team at any point for pastoral help and guidance. We offer support regardless of religious beliefs. The Chaplaincy team will support the manager in any way they can as they go through the Death in Service Procedure.</p> <p>Chaplaincy can offer advice on live streaming of funeral services and where possible (and with the agreement of the family) and if available set up a live stream broadcast in one of the Chaplaincy venues.</p>

Document Title: Death in Service Procedure	6 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

	<p>Memorial books/Books of condolence are available on request. These could be placed in The Sanctuary B5 UHW or the Chapel UHL for staff to write their condolences in.</p> <p>The Chaplaincy team work closely with the Bereavement team The Bereavement Team will provide support for as long as is needed; there is no timeline on grief. They are able to refer onto third sector agencies for further support such as counselling and peer support.</p>
1.5	Payroll
	The Payroll department are responsible for ensuring the timely administration of payment of salary and, where appropriate, pension administration.
2	PROCESS
	In the unfortunate event of an employee death in service, the following procedure should be followed.
2.1	<p>Correspondence and Communication</p> <p>The deceased's departmental manager (with support from the relevant Directorate Manager/Senior Nurse or other appropriate manager) should inform the Chair's PA, Payroll, the Clinical Board Head of Workforce and OD and any other key parties as soon as possible. The following correspondence will follow:</p> <ol style="list-style-type: none"> 1. A signed letter of condolence will be sent by the Chair on behalf of the UHB. This will be based on the information provided by the line manager using the proforma attached in Appendix 1 2. (optional) The line manager may wish to send a personal card, note or flowers to the next of kin expressing their sorrow at the loss of their employee. The content of this letter will be dependent on the individual manager and member of staff. 3. To follow approximately one week after the first two. The focus of this letter, as well as expressing sympathy, will focus on the practical need of administering pensions and pay issues. It is essential that the name, address and contact details of the Next of Kin are requested in this letter so that payroll can contact them to arrange payment of any monies owed. The co-ordination and responsibility of this letter will be the deceased's immediate line manager but a suggested template is attached as appendix 2.

Document Title: Death in Service Procedure	7 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

2.2

Administration

The line manager is responsible for ensuring that a Termination Form is completed and sent in confidence to payroll as soon as possible in order to avoid any overpayment. The reason for leaving should be recorded as 'death in service'. If known, details of the executor of the estate / next of kin (name, address, relationship to the deceased and contact telephone number) should be included as this information is required by the Pensions Department.

Any outstanding annual leave should be calculated and recorded in the usual way.

No deduction from the final salary payment should be made in respect of annual leave taken in excess of entitlement on the date of death. Therefore, overtaken annual leave should not be recorded on the termination form

Upon notification of a death in service the Payroll department will stop all payments until they have received a termination form. If there is a Will the next of kin details are also required with copies of the Letters of Administration. If there is no Will any monies due will be payable to the Executor of the Estate.

If the deceased employee was a member of the NHS Pension scheme, on receipt of the termination form the Pensions department will contact the next of kin to either arrange a meeting or to confirm documentation will be sent in the post so that the pensions administration can be processed.

Where the payments due are in excess of £5,000 and there is no legal spouse/partner Grant of Probate will need to be obtained before any monies can be released.

2.3

General Guidance

Line managers should consider in conjunction with family wishes any or all of the following:

- opening a memorial book
- It might be seen as appropriate for a Director or Senior Manager to represent the UHB at a senior level by attending the deceased employee's funeral. Line Managers should discuss this with the family and assess whether or not it is appropriate. If so, the Director/Senior Manager's PA should be informed in good time to arrange attendance.
- Managers are also encouraged to afford as much flexibility as possible to allow colleagues to attend the funeral, if this is the families wish
- The involvement of the UHB chaplaincy team and a memorial service.
- A message sent via the news email/intranet notifying the UHB of the deceased's death and, if appropriate, details of a memorial service.

Document Title: Death in Service Procedure	8 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

2.4	<p>Wellbeing</p> <p>Managers need to be aware that grief can manifest in many different forms. The initial shock should not be assumed to be the only symptom of grief, and behaviours may change over several months. Staff should be made aware of the Employee Wellbeing Service in a supportive and understanding manner. Counselling or other support may also be available through the bereavement service, professional bodies, trade unions and primary care.</p> <p>Should the level of grief in a department become substantial the manager can contact the Lead Counsellor within the Employee Wellbeing Service for advice and support. Staff members with ongoing bereavement needs can be referred (by manager or self-referral) to the occupational health department if appropriate.</p>
3	<p>DEATH AT WORK</p>
	<p>If someone died as a result of a work related activity the Incident, Hazard & Near Miss Reporting Policy applies.</p> <p>If this scenario occurs the Line Manager must contact the Health & Safety Unit immediately so that an immediate and urgent investigation can be undertaken.</p>
4	<p>CONFIDENTIALITY</p> <p>All calls, correspondence or queries in person relating to the death in service must be dealt with in a confidential and sensitive manner. Where there is likely to be press interest or it is appropriate for staff obituary, press releases etc. please contact the Assistant Director of Strategic Communications or a member of the Communications team immediately to brief them on the circumstances and agree a strategy for dealing with queries. No information should be given to any external enquirer; instead they should be referred to the Communications team.</p>
5	<p>SALARY SACRIFICE SCHEMES</p>
	<p>Where a member of staff has an agreement where payment for goods or services (e.g. Childcare Vouchers, Cycle to Work Scheme, Lease Cars) 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.</p>

Document Title: Death in Service Procedure	9 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		



GIG
CYMRU
NHS
WALES

Bwrdd Iechyd Prifysgol
Caerdydd a'r Fro
Cardiff and Vale
University Health Board

Appendix 1

**DEATH IN SERVICE PROFORMA
DETAILS FOR LETTER FROM CHAIR**

Title: Mr/Mrs/Miss/Ms/Dr/Other	
Name of Member of Staff:	
Job Title:	
Dept/Directorate/Location:	
Name of Next of Kin:	
Address of Next of Kin:	
Relationship of Next of Kin:	
Start Date in UHB (<i>if known</i>):	
Cause/Date of Death (<i>if known</i>):	

Document Title: Death in Service Procedure	10 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date: 09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

<p>Please provide the Chair with a few comments to enable a more personal letter to be sent with condolences:</p>	
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<p>Person Filing Details: Name/Job Title/Tel No:</p>	
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Please ensure all parts of this form are completed and e-mail if possible to:
Janice.Pitt@wales.nhs.uk or send to:
 Janice Pitt, Room 9 - Boardroom Corridor, University Hospital Llandough, Penlan
 Road, Penarth CF64 2XX
 Tel: 02921 826884 - Ext: 26884 UHL

Thank you

Document Title: Death in Service Procedure	11 of 11	Approval Date: 09 Mar 2022
Reference Number: 197		Next Review Date:09 Mar 2025
Version Number: 3		Date of Publication: 26 Apr 2022
Approved By: Employment Policy Sub Group		

Appendix 2 – suggested letter (n.b. please personalise this as appropriate to suit the individual circumstances)

PRIVATE AND CONFIDENTIAL

Date:

Name of Next of Kin

Address 1

Address 2

Address 3

Address 4

Post Code

Dear Name of 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 (*employee's name*)'s colleagues would like to convey their deepest sympathies at this difficult time for you and your family [*or similarly worded paragraph*].

(*Employee's name*) was – insert optional paragraph about the person and their contribution to work.

I am sorry to intrude at this difficult time and we will do all that we can to minimise the burden to you at this time, but there are a number of administrative matters that need to be addressed. The payroll department are in the process of completing the necessary paperwork for any monies owing and will issue this in the form of a cheque made payable to the estate of (*employee's name*). Please could you therefore let me have the name and address of the executor?

Please contact me on XXXXXX if there is anything I can help you with, or if you have any queries about the content of this letter.

Yours sincerely

Name

Managers Job Title