### Policy statement
The death of an employee is upsetting. This Policy provides information and the process that must be followed when a death in service occurs.

### Scope
All employees employed by a Hampshire County Council department or a Hampshire maintained schools on the following terms and conditions:
- EHCC
- Soulbury
- Teachers

### How to use this document
This document is not part of the formal policy. Instead it provides additional information to help you as a manager in the practical day-to-day application of the policy.

It is expected that you will have an understanding of the Death in Service Policy prior to using this guide.
Content

Introduction .......................................................................................................................... 3
How to manage media interest in the death ................................................................. 3
How to communicate the news to colleagues ................................................................. 3
Schools only – ................................................................................................................. 4
How to communicate to pupils and parents ................................................................. 4
How to contact the next of kin ..................................................................................... 4
How to conduct a follow-up conversation / meeting with the next of kin ........... 4
Administrative requirement ......................................................................................... 5
  Leaver form .................................................................................................................. 5
  How to manage annual leave arrangements ............................................................. 5
  How to manage loans or overpayments .................................................................... 5
  How the final salary/ pension payments are made ..................................................... 6
  How to manage IT account access ............................................................................. 6
  How to review work arrangements .......................................................................... 6
How to manage requests for time off for the funeral .................................................. 6
Frequent queries relating to pensions ......................................................................... 7
Useful Contacts ............................................................................................................. 7
Roles and responsibilities .............................................................................................. 9
Support .......................................................................................................................... 10
Death in Service – Manager’s Checklist ..................................................................... 11
Governance ................................................................................................................... 10
## Introduction

It is important that the death of an employee is handled in a sensitive and compassionate manner and that support is made available to staff who need it.

Senior management and HR Operations/Education Personnel Services must be notified immediately.

If a person dies as a result of a work-related incident, the manager should immediately contact the appropriate health and safety team. They will support and assist in the management of the situation and advise on reporting the incident to HSE.

In the case of the death of a Headteacher, the Chair of Governors should also notify and liaise with the School Improvement Manager.

## How to manage media interest in the death

Where you anticipate media interest you must contact Corporate Communications who will deal with any enquires. No information can be given by members of the team.

## How to communicate the news to colleagues

The death of a colleague may have a major impact on other employees. You need to handle any conversations sensitively. You should:

- first talk to employees who worked closely with the employee
- inform other staff including those who are absent (on maternity leave, sickness, etc)
- communicate the news in a private environment if possible
- allow staff time to grieve
- allow employees to attend the funeral, if this is agreeable to the next of kin and can be accommodated by the department/school (it should be noted that schools should not be closed on the death of an employee)
- encourage employees to seek counselling if necessary
- inform HCC’s Employee Support service of potential contact from staff (alternative counselling services may be available to other staff)
- where appropriate, contact customers and suppliers to advise them of the employee’s death
- where it is known that the employee was a member of a trade union:
  - contact the relevant union to inform them of the death
- ask for postal communication to stop to avoid any distress to the family
- establish if a death in service payment may be due from the union
- where the employee had been referred to Occupational Health, advise them of the employee’s death

- operate an open-door policy for those suffering from emotional distress, or provide alternative access to an appropriately nominated member of staff

**Schools only**

**How to communicate to pupils and parents**

When someone dies who is known to a child or children in the school community, communicating this news and providing support to meet their needs may not be an easy task. Also, consideration must be given to when, and whether, to inform parents. Headteachers may find the information contained within the Schools Section of the Child Bereavement Charity website helpful when facing this situation. Use of the charity’s services is at the discretion of the school. A list of other support agencies can be found in Useful Contacts.

**How to contact the next of kin**

You may wish to prepare for an initial telephone conversation, being mindful it needs to be handled sensitively and it may not be appropriate to ask all questions in one phone call. The conversation is an opportunity to ask initial questions so you can confirm information such as:

- who is the next of kin, and if they or someone else will be the main contact for the family – making a note of contact details
- what information would they like to be shared with colleagues?
- are colleagues invited to attend the funeral, if so what are the funeral arrangements?
- what are the arrangements for floral and other tributes?
- answer any questions the next of kin may have
- explain that a further telephone conversation may be necessary to gather further information
- offer a home visit?

**How to conduct a follow-up conversation / meeting with the next of kin**

You may find it helpful to use the Managers Checklist (see Appendix) as you should:

- answer any questions the next of kin may have
- return any personal belongings to the next of kin
- gain confirmation of funeral arrangements if not already received
• arrange for the return of articles and equipment, e.g. keys, identity card/pass, etc. (ensuring relatives/next of kin are not pressured to return equipment immediately unless there is a security implication)

**Administrative requirement**

HR Operations/Education Personnel Services will notify the IBC Payroll and Employer Pensions Administration teams, by email, and then take responsibility for overseeing the process until conclusion.

**Leaver form**

You must complete an e-leaver form as soon as possible. This is crucial as it triggers the payment of final salary and pension benefits. The last date of employment is the date that the employee passed away.

Delay in any information, i.e. the calculation of any annual leave due, will delay the payment of final pay or lead to an over-payment.

**How to manage annual leave arrangements (except for those with term time only contracts)**

You must provide details of any outstanding annual leave, or any other payments owed to the deceased on the e-leaver form. If this is not immediately possible, process the leaver form and notify HR Operations/Education Personnel Services of any outstanding information as quickly as possible.

*Note:* No deduction from the final salary payment is made in respect of annual leave taken in excess of entitlement on the date of death.

**How to manage loans or overpayments**

IBC Payroll will confirm details of any loans or overpayments. You are responsible for gaining a senior manager’s decision on whether these are to be recovered, and if so, agreeing the re-payment options with the next of kin.

This is not an exhaustive list, but overpayments or loans could relate to:

- salary
- occupational/statutory benefits (as these are not salary)
- allowances
- travel loans
- salary sacrifice
- vocational training fees
- lease car

Where an employee had an outstanding loan you must contact benefits@hants.gov.uk to establish the settlement figure and the re-payment options.
### How the final salary/pension payments are made

The following process applies to the payment of final salary:

- monies due to the deceased will be withheld until the IBC has all the relevant information and calculated the final payment due to the estate – this payment is exempt from National Insurance from the 1st of the month in which the employee died
- payment will be made to the normal bank account of the deceased
- if the next of kin says they will not be able to access these monies, you must inform HR Operations/EPS
- all forms and correspondence should be passed via HR Operations/Education Personnel Services who will arrange for forwarding to the necessary party
- where the employee was a member of a pension scheme the IBC will notify Hampshire Pensions Services and provide them with the relevant personal and pay details
- the IBC Payroll and Employer’s Pension Admin. Team will update their systems

### How to manage IT account access

You must notify the IT department (or your IT provider) to request the close down of the deceased employee’s IT accounts.

You must arrange for the removal of the employee’s details from all distribution lists.

### How to review work arrangements

You must consider work arrangements, making appropriate interim arrangements to cover the deceased employee’s work. This may include re-allocating work to existing employees and/or reconfiguring the team to cover work. In the future alternative arrangements will need to be reviewed to cover the deceased employee’s work on a permanent basis.

### How to manage requests for time off for the funeral

You should check with the family to understand their wishes relating to any funeral or memorial service. If they are happy for colleagues to attend you should be as flexible as possible, but any final decision is to be based on the needs of the service and what can be accommodated.
Queries relating to pensions should be directed to Pensions Services. The following general information may be helpful.

Q: Is a lump sum death grant available?  
A: Yes, if the employee was a member of a pension scheme. This is a personal payment to any named beneficiary/ies and does not form part of the estate.

Q: What happens if the employee did not nominate who they wished the death grant to be payable to?  
A: Any payments due will be payable to the estate.

Q: Will pension benefits be payable to the employee’s civil partner?  
A: Pension payments are normally paid to a spouse, civil partner or nominated co-habiting partner providing that the relevant paperwork has been completed.

Useful Contacts
Access to free, confidential and impartial Employee Support is available to all HCC employees. 0800 030 5182
Please visit the webpages for further information
http://www3.hants.gov.uk/occupational-health/employee-support.htm
Alternative counselling services may be available to other staff.

Trade Union contacts
ATL/AMIE 020 79 30 6441
ASCL 0116 2991122
GMB South Coast Office 01489 578665
NAHT 0300 30 30 333
NASUWT South East Regional Centre 01483 226130
NUT 020 3006 6266
NUT regional office 01444 894500
UNISON 01962 842094
UNITE Regional Office 01753 313 820
VOICE General Enquires 01332 372337

Age UK 0800 169 2081
Age UK is a national charity focused on helping and supporting the elderly. It can offer practical advice such as registering a death, arranging a funeral and sorting out financial matters.
http://www.ageuk.org.uk/

Child Bereavement Charity
The Child Bereavement Charity is the UK’s leading national organisation that supports families and provides training to professionals across the entire spectrum of child bereavement. They have a dedicated section for schools.
Citizens Advice Bureau 03444 111 444
Service for helping people to resolve their legal, financial and other problems by providing free, independent and confidential advice.
http://www.citizensadvice.org.uk/

Cruse Bereavement Care 0808 808 1677
Cruse Bereavement Care works with and supports people who have been bereaved. It focuses on helping them understand their grief and cope with their loss.
http://www.crusebereavementcare.org.uk/

Local Government Pension Scheme (LGPS) 01962 845588
http://www3.hants.gov.uk/finance/pensions.htm

Registering a death in Hampshire 0300 555 1392
Services for registering of a death. Phone lines are open Monday to Friday 8am - 8pm and Saturday 9.30am - 4pm.

The Samaritans 116 123
The Samaritans offer confidential, non-judgmental support through a telephone help line. The line is available 24 hours a day, and is for people who are experiencing severe distress or despair. It also offers support through emails, letters and face-to-face meetings.
http://www.samaritans.org/

Simon Says – Child Bereavement Support
Simon Says – Child Bereavement Support
Simon Says is a charity with the aim of supporting children and young people within Hampshire, who have a close relative or friend who has died or is dying. Whether the death was sudden or expected, the charity works closely in practical and creative ways with all members of the family to create an atmosphere in which grief can be shared and the child or young person can be supported.

Teachers' Pensions 0845 609 9899
https://www.teacherspensions.co.uk

Winston's Wish – charity for bereaved children
Winston’s Wish is a childhood bereavement charity and a provider of services to bereaved children, young people and their families in the UK. They offer practical support and guidance to families, professionals and anyone concerned about a grieving child. They have a dedicated section for schools.
Roles and responsibilities

Senior manager:
- sending a letter of condolence to the next of kin
- deciding whether it is appropriate for any overpayments/loans to be recovered

Manager/primary contact:
- informing a senior manager as soon as you are aware of a death
- informing HR Operations/Education Personnel Services as soon as you are aware of the death
- informing colleagues
- following the accident/incident reporting procedure if the death occurred at work
- completing the e-leaver form as soon as possible
- establishing the name of the next-of-kin, and the name of the contact for the next-of-kin/family if different
- visiting as appropriate
- liaising with HR Operations/ Education Personnel Services so the correct correspondence and forms are completed in a sensitive and timely way
- asking the family contact if the employee was a member of a trade union
- notifying senior management of any overpayments/loans so it can be decided if/how these are to be recovered
- reviewing work arrangements
- cancelling IT account access
- arranging for the return of equipment
- returning personal belongings

HR Operations:
- informing IBC Payroll and IBC Employer Pension Admin teams of the death
- advising on the completion of letters and relevant documentation
- advising on policy application and best practice
- liaising with other Council departments where appropriate
- making sure activities required of managers, HR and the IBC are completed at defined stages

IBC Payroll:
- providing a single point of contact to work with HR Operations / Education Personnel Services
- providing any required correspondence to HR Operations / Education Personnel Services so arrangements can be made to sensitively pass these to the next of kin
- providing details of any overpayments to management and
HR Operations/Education Personnel Services
- contacting the Travel and Loans Team to obtain details of any loans and providing relevant details to the manager and HR Operations/Education Personnel Services
- providing the final salary amount to HR Operations/Education Personnel Services to forward to the manager
- making payment of final salary as soon as the all necessary details are confirmed

IBC Employers Pension Admin Team:
- providing a single point of contact to work with HR Operations / Education Personnel Services
- providing all required correspondence to HR Operations / Education Personnel Services so arrangements can be made to sensitively pass these to the next of kin
- liaising with HR Operations/Education Personnel Services throughout
- providing payroll details to Hampshire Pensions Services

Trade union representative:
- supporting the deceased member’s next of kin
- arranging for death in service payment to be made if this is due
- arrange for any union communications to cease to avoid further distress for the family

Support
Managers: Any queries can be directed to:
HR Operations: 01962 813915
EPS: 023 8038 3500

How to guide
Governance

<table>
<thead>
<tr>
<th>Hantsfile reference:</th>
<th>13148758</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of publication:</td>
<td>April 2015</td>
</tr>
<tr>
<td>Version:</td>
<td>v1  April 2014</td>
</tr>
<tr>
<td></td>
<td>v1.1  April 2015</td>
</tr>
<tr>
<td></td>
<td>v2   May 2017</td>
</tr>
<tr>
<td>Owner:</td>
<td>HR Operations</td>
</tr>
<tr>
<td>Related EHCC 2007 section:</td>
<td>N/A</td>
</tr>
</tbody>
</table>
## Appendix 1

### Death in Service – Manager’s Checklist

<table>
<thead>
<tr>
<th>Tick</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Inform organisational Senior Manager and HR Business Partner or Chair of Governors of the death in service (confirm whether died whilst on duty)
- **Police only** – Inform the Federation and Welfare Fund

- If the death is a result of an accident at work or work-related incident, immediately contact the Health and Safety team who will assist in management of the situation

- Contact HR Operations/EPS to notify them of the death and known details. HR Operations / EPS will provide you with a dedicated caseworker

- As soon as available, provide HR Ops/EPS with
  - Name of primary contact for organisation
  - Name of family contact and contact details

- Make interim arrangements to cover employee’s work

- **Schools only** - Where the Headteacher dies, the Chair of Governors must inform and liaise with the School Improvement Manager; school senior leadership team & governing body

### Personal data

Check the following details are correct on SAP/records

- Name & address of next-of-kin
- Relationship to the deceased

### Contact with next of kin

- Check next of kin’s details on system are correct
- Confirm who will be main contact for family and agree preferred contact arrangements (visit/phone/email/letter)

- Confirm:
  - the nature of death
  - what information may be shared with colleagues
  - funeral arrangements and whether colleagues are welcome to attend
  - arrangements for floral and other tributes
  - if not already known, ask if employee was a member of a trade union
  - make arrangements for return any personal items
and request return of any employer equipment, e.g. ID badge, keys, computer equipment, mobile phone, uniform, documentation, etc
  - answer any questions from the next-of-kin
  - explain a further telephone conversation or home visit may be required

<table>
<thead>
<tr>
<th>Leaver form</th>
</tr>
</thead>
</table>
| • Complete the on-line leaver form (including calculation of any unused leave entitlement*)
• Check if there are any loans/overpayments and liaise with senior management on decisions relating to recovery (or not)
  *If you are unable to include holiday pay figures, you must submit the Leaver Form and then provide HR with the holiday pay details asap. **Final pay cannot be paid until all pay data is known.** |

<table>
<thead>
<tr>
<th>Initial communications</th>
</tr>
</thead>
</table>
| • Arrange for Manager to send letter of condolence within 1 week of the employee’s death
• Inform colleagues (including those on maternity leave or sickness absence) and provide details of Employee Support Helpline [freephone 0800 030 5182 (schools may subscribe to an alternative service)](https://www.example.com)
• Inform IT department to shut down IT access
• Remove name from all distribution lists
• Inform customers/ suppliers where appropriate
• Notify OH if the employee was under a current referral
• Inform the trade union representative (if it is known the employee was a member) to establish if a death in service payment is applicable, and to remove deceased’s name from mailing lists
• Inform the [Communications](https://www.example.com) department, if appropriate
• Inform any other relevant parties/contacts (both internal and external where appropriate)

<table>
<thead>
<tr>
<th>Continued support / management</th>
</tr>
</thead>
</table>
| • Ensure colleagues know how to access Employee Support (schools may subscribe to an alternative service)
• Provide 1:1 meetings for staff, where helpful
• Consider how to cover job role and action |