

## Death Notifications

## Death Notifications

**1. These notifications can be received by:**

- E-mail
- CIS broadcast via a task
- post via a task; or
- phone call – you must attempt to redirect all calls reporting death to the Bereavement Service. The caller must redial the PIP Enquiry Line number 0845 850 3322 and select the option ‘to report a death’.

## Death notified by Email

**2. The e-mails can come from:**

- **The Bereavement Service (BS)** – using the Bereavement Information Capture Tool (BICT)
- **Tell Us Once (TUO)** – using the Change Reporting System (CRS). These e-mails should be marked '**RESTRICTED – URGENT – TUO**' in the subject field.

**3. E-mails notifying the death of a PIP claimant will be received by the following email accounts:**

- XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
- XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

as appropriate. The inboxes must be accessed at least twice a day and the emails for Benefit Centres other than Bootle will be forwarded from Bootle to a SPOC at the relevant BC below:

[Contact email addresses redacted - Exclusion 40 applied: Personal information]

- [DWP Bristol PIP Bereavements Information](#)
- [DWP SCOTLAND DBC PIP Bereavement Information](#)
- [DWP Yorkshire BC PIP Bereavements Information](#)
- [DWP Wales BC PIP Bereavements Information](#)

**4. BICT emails notifying the death of a PIP claimant will have the DLA box ticked but the Additional Information Notes box will state 'PIP Death notified not DLA'.**

**5.** For each email received in the SPOC inboxes the User responsible must take the following action:

Step	Action
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# PIP User Guide

1	<b>IMPORTANT</b> – this action must be taken before a Date of Death (DOD) is input to PIPCS end any PAB relationship held on PIPCS <b>See:</b> To End a Relationship on PIPCS in this chapter
2	check to see if there are any cancelled (returned) payments and if there are you must attempt to invalidate the cancelled payment <b>See:</b> ARUC guidance
3	input the DOD to PIPCS if it is not already held. This will set an automatic Nominee Level Suspension <b>See:</b> To Input the Date of Death on to PIPCS in this chapter
4	create a manual task to prevent case closure using 'NINO - to prevent case closure' in the subject field. Assign the task to yourself and defer it for 5 days <b>See:</b> How to create a manual task User within the Workflow and Task Management chapter of PIPCS guidance
5	print a copy of the email and any attachments and send this copy to the MOU to scan the email on to DRS <b>See:</b> Sending hard copy documents to be scanned
6	check if the case has a Special Caution Data Marker (Fraud) displayed on PIPCS claimant information page. This can be displayed as either 'Under Investigation', 'closed fraud', or 'proven fraud'. If there is the SPOC must send a task to PIP Specialist Fraud Team to advise them of the DOD

6. The hard copy of the email must be sent to MOU by the courier service. Using the One Line Courier Address for purple polylopes.

**See:** Postal and Courier Address list for PIP

When sending documents for more than one claimant in the same polylope, ensure all the documents related to a claimant are separated from the other documents by using plastic wallets within the polylope.

**See:** Sending hard copy documents to be scanned

**See:** Security Note - Use of courier service

## Email security

7. All TUO and BS e-mails **must** be deleted after they have been actioned. They **must** also be emptied from the team members 'deleted items box' in Outlook to

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avoid unauthorised disclosure or breach of DPA. Line Managers / Units have responsibility to ensure this practice is embedded.

## Death Notified via CIS

8. Deaths notified via CIS will automatically have:

- the DOD applied to PIPCS
- a task created for the user to determine if any follow up action is required; and
- a Nominee Suspension set on the case

**See:** Task received notifying the death of a claimant in this chapter

## Death Notified by Post

9. The post will be opened and scanned in the MOU. The User will be able to access the scanned image via a task sent to them.

**See:** Task received notifying the death of a claimant in this chapter

## Death Notified by Phone call to PIP

10. Any death notifications received by phone in PIP should be redirected to the Bereavement Service (BS). This is advantageous for the caller because the BS offer an eligibility check for any Bereavement Benefits that the caller may be entitled to.

11. If the caller insists on reporting the death and refuses to call the BS, the PIP agent will gather the details of the caller and create an URGENT task for the delivery team to make further enquiries as necessary.

## To End a Relationship on PIPCS

12. To end any existing PAB relationship on PIPCS the User must take the following action, this **must** be done **before** inputting the DOD to PIPCS:

Step	Action
1	input NINO/CRN in RHS search box. Search results will display
2	select Person Homepage
3	on the Person Homepage select the Background tab at the top
4	select the Relationship tab from the LHS menu
5	select the green Action button on the RHS and select Edit from the drop down menu. The Edit Relationship screen will display

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6	in the End Reason field, select Other from the drop down menu
7	input the DOD in the To field
8	select save.

### To Input the Date of Death on to PIPCS

**13.** To record the DOD on to PIPCS the User must take the following action which will ensure no payment is made after the DOD:

Step	Action
1	ensure any PAB relationships held have been ended on PIPCS <b>before</b> inputting the DOD <b>See:</b> To End a Relationship on PIPCS in this chapter
2	input NINO/CRN in RHS search box. Search results will display
3	select Person Homepage
4	on the Person Homepage select the green Action button on the top right hand side (RHS)
5	from the drop down menu select Edit. The Edit Person screen will display
6	input the DOD and if it is a verified DOD click on the verified box and a tick will display
7	select save. The Person Homepage displays showing 'Deceased' as a watermark. A Nominee Level Suspension will automatically have been put on the case. This will ensure no outstanding payment for a period before the DOD is issued to the deceased.
8	<b>please note</b> – inputting a DOD on PIPCS will trigger the case to close overnight. If there is any further action to be taken, for example arrears due or an overpayment, a task must be created to prevent case closure as follows:  create a manual task to prevent case closure using 'NINO - to prevent case closure' in the subject field. Assign the task to yourself and defer it for 5 days  <b>See:</b> How to create a manual task User within the Workflow and Task Management chapter of PIPCS guidance

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## Task Received Notifying the Death of a Claimant

**14.** When a task is received notifying the death of a claimant you must:

- ensure any PAB relationship held on PIPCS is ended
- access PIPCS to ensure the DOD is held. If not, input the DOD
- check if the case is with Fraud and if so send a manual task to PIP Specialist Fraud Team
- check if the claimant was awarded Enhanced Mobility and has a Motability Agreement. If so send a manual task to Mota to advise them of the death
- when the PIP claim is pre decision or the case has an ongoing dispute, establish whether the NOK wishes to continue with the claim
- when the case has an ongoing appeal, phone HMCTS to notify them of the DOD and advise them that we will be in touch when we have a response from the Claimant's Representative/ NOK advising if they wish to continue with the appeal
- consider closing all tasks to allow Case Closure to proceed (if no Overpayment or arrears due)
- check if this is a reassessment case

**See:** Death during Reassessment claim in this chapter

**See:** To End a Relationship on PIPCS in this chapter

**See:** Notification of death received pre PIP decision in this chapter

**See:** How to create a manual task User within the Workflow and Task Management chapter of PIPCS guidance

**See:** Appeals guidance

**See:** Death of a Claimant with a Motability Agreement in Place in this chapter

## Death during Reassessment claim

**15.** If a claimant dies:

- after a PIP invite has already been issued but not returned;
- a PIP claim has been sent in but not yet processed; or
- a decision has been made but the claimant has died before the first day of PIP entitlement.

You must:

Step	Action
1	ensure all tasks are closed on the claim to allow the PIP claim to close overnight

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2	consider issuing form PIP0219 to advise no further action to be taken on PIP
3	take action on the DLA case as per DLA guidance

**See:** DLA/AA Death Guidance

### Recording death when date not known

**16.** If you have been notified that a claimant has died but do not know the DOD, record the current date or the date of the post as 'NV' on PIPCS and consider requesting a copy of the death certificate.

### Death of a Claimant with a Motability Agreement in Place

**17.** When a claimant has had a Motability Agreement a task must be sent to Mota to advise them of the death.

### Death Arrears due and Motability Agreement in place

**18.** Death Arrears Payee (DAP) details must be established and input to PIPCS. Arrears due to the Mota Nominee will be paid and any remaining arrears paid to the DAP when the suspension is lifted.

**See:** Paying arrears of PIP to the Death Arrears Payee in this chapter

### Overpayment following death and Motability Agreement in place

**19.** If an overpayment has occurred the PIP user will take action on the overpayment of daily living and mobility. Mota will take action on any overpayment to MOPS. Case closure will not occur until Mota have completed their action and closed their tasks.

**See:** Overpayment Occurred Following the Death of the Claimant in this chapter

### Notification of death received pre PIP decision

**20.** When a death is notified before a decision has been made on the PIP claim you must:

Step	Action
1	ensure the DOD is held on PIPCS
2	<b>if the PIP2 has not been returned</b> - to stop an automated disallowance notification being issued for non receipt of the PIP2, set the Alternative Formats Flag to Braille. When produced this notification will route through to the Alternative Formats team, who will destroy the notification <b>Please Note</b> – The Alternative Formant Flag must remain set to Braille

## PIP User Guide

	until the decision notification is ready to be issued to the DAP/NOK <b>See:</b> PIP user identifies business reason to suppress an automated notification and an enquiry form within the Notifications chapter of PIPCS
<b>3</b>	<b>if the PIP2 has not been returned</b> - extend the PIP2 timer for a further 90 working days in addition to the 40 days already set <b>See:</b> Extending the PIP2 timer after death if PIP2 not returned within the New Claims chapter of PIPCS guidance
<b>4</b>	<b>if the PIP2 has not been returned</b> – and Additional Support is indicated, the Additional Support Flag must be removed from the Medical Evidence Details Screen <b>See:</b> Removing the Additional Support Flag within the Vulnerable claimants chapter in PIPCS guidance
<b>5</b>	issue form PIP3027 to establish if the claimant's representative or NOK wishes to continue with the PIP claim
<b>6</b>	create a 10 working day task for the return of form PIP3027

### No representative or NOK established pre decision

**21.** If no customer representative or NOK can be traced through any details held on PIP or other benefits, a manual task must be created and deferred for 6 weeks from the date the last enquiry was made.

**22.** When this task matures, another search for a representative must be undertaken and if no details found the case should be withdrawn.

**See:** Withdrawn Claim

### If no reply to form PIP3027

**23.** If no reply is received to form PIP3027 when the task matures:

Step	Action
<b>1</b>	attempt to contact the claimant's representative by phone to remind them to return form PIP3027
<b>2</b>	if it is not possible to phone, issue a duplicate form PIP3027
<b>3</b>	defer the task for 10 working days for the return of form PIP3027
<b>4</b>	if no response received when the task matures, note the Communications Record and the case should be withdrawn.

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	<b>See:</b> Withdrawn Claim
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### **Representative or NOK wishes to continue with the PIP claim**

**24.** When form PIP3027 is returned, if the representative or NOK wishes to continue with the claim:

<b>Step</b>	<b>Action</b>
<b>1</b>	complete form PIP0305 with details of the claimant and their representative and print the form
<b>2</b>	refer form PIP0305 to the TL to sign on behalf of the Secretary of State to appoint a person to act for the deceased

**25.** When you receive form PIP0305 back from the TL send it to MOU to be scanned and refer to the CM guidance link below.

**See:** Sending Hard Copy Documents to be Scanned

**See:** Death notified pre and post decision – decision making guidance - Claimant dies before claim decided

### **Representative or NOK does not wish to continue with the PIP claim pre decision**

**26.** If they do not wish to continue with the claim you must treat the claim as withdrawn.

**See:** Withdrawn Claim

Spare paras 27-30

### **How to determine the Death Arrears Payee**

**30.** Any money due following the death of a claimant will be paid to the Death Arrears Payee (DAP) following an order of precedence. When money is due, the order of precedence applies to all cases, irrespective of any person appointed by the S of S during the lifecycle of a claim.

The DAP details should be input to PIPCS if arrears after death are due and can be input just before the death arrears payment is to be made.

**See:** Inputting Death Arrears Payee Personal Details to PIPCS in this chapter

**31.** The usual order of precedence is:

<b>Person</b>	<b>Notes</b>
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<b>1</b>	<b>Executor of the will</b>	the executor of the will includes the administrator of the estate if the claimant died without making a will.
<b>2</b>	<b>Person responsible for funeral expenses</b>	<p>consider a person, health authority or local authority if:</p> <p><b>1</b> they are nominated on the death certificate, form BD8, with details on the reverse to claim for arrears of benefit; and</p> <p><b>2</b> they have obtained an estimated bill for the cost of the funeral from a funeral director.</p>
<b>3</b>	<b>The person who maintained the claimant immediately before death</b>	<p>consider a person who maintained the claimant immediately before death including:</p> <p><b>1</b> a HA</p> <p><b>2</b> a LA; or</p> <p><b>3</b> the proprietor of a care home. Invite the care home to apply for payment of arrears of benefit if they have met the funeral expenses. If there is no executor of the will or administrator of the estate, pay arrears of benefit to them up to the amount of any outstanding fees.</p>
<b>4</b>	<b>The person who benefits from the claimant's will</b>	consider the person who benefits from the claimant's will or the legatee if the will has been acted upon.
<b>5</b>	<b>The NOK</b>	consider the NOK, for example, the widow or widower unless a decree of judicial separation was in force, children, parents etc. If the claimant did not leave a will and no NOK claims arrears of benefit, the Treasury Solicitor submits an application for the arrears of benefit. In these cases, treat the Treasury Solicitor as the NOK and pay any arrears to them.
<b>6</b>	<b>A creditor</b>	consider creditors, providing they can give evidence of the debt. Arrears of benefit can only be paid up to the amount of the debt.

**32.** Before paying arrears to a DAP you must ensure all suspensions on the case are lifted. This includes:

- Component Level Suspensions
- Nominee (Automatic) Suspensions
- Benefit Delivery Case Suspensions.

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### No Representative or NOK or DAP Established Post Decision

**33.** If arrears of PIP are due following the death of the claimant and you cannot establish anyone as the Death Arrears Payee, you must create a manual payment in PIPCS. (This will create a record to prevent PIPCS making any payment - mobility or care. PIPCS will think a payment has been made off system but no payment would be made on CPS LP).

**Please Note:** Only a limited number of users have access to manual payments in PIPCS. Therefore if the user does not have access they will need to send a manual task to a user who does with all the details required (if the user is the CPS LP user they will still need to create the manual task and assign to themselves).

**34.** To create the manual payment:

Step	Action
1	enter the NINO in top right hand side (RHS) box. The search results display
2	select the Benefit Delivery Case which is shown as PIP under the Details heading and Case under the Type heading. The PIP Benefit Case Evidence Summary screen displays
3	select the Financials tab
4	select Transactions from the LHS menu
5	select Manual Payment button on RHS. New Manual Payment Details screen displays
6	to create a manual payment record complete the following fields: <ul style="list-style-type: none"><li>• <b>Reference number</b> - input <b>0000000</b> (normally it would be the CPS LP reference number)</li><li>• <b>Amount</b> – this is the total amount of the death arrears which are due</li><li>• <b>Start Date</b> – this will be the date when the death arrears are due from</li><li>• <b>End Date</b> – this will be the end date of the period of death arrears due (usually the date of death)</li></ul>
7	in the comments box clearly state that the payment is for death arrears that are due but cannot be paid as DAP not established. Include how the manual payment has been calculated giving details of the period, component, rates and the total amount due  <b>Note:</b> User must ensure period is accurate and within a cover period as PIP does not adhere to benefit weeks, for example; date of change is the

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	same day affected
8	select Save
9	the Manual Payment Confirmation screen displays, select Save

### Representative or NOK or DAP Established But Does Not Wish to Claim Arrears Due Post Decision

**35.** If arrears of PIP are due following the death of the claimant and the DAP has been established but they do not wish to claim the arrears due, you must create a manual payment in PIPCS. (This will create a record to prevent PIPCS making any payment - mobility or care. PIPCS will think a payment has been made off system but no payment would be made on CPS LP).

**Please Note:** Only a limited number of users have access to manual payments in PIPCS. Therefore if the user does not have access they will need to send a manual task to a user who does with all the details required (if the user is the CPS LP user they will still need to create the manual task and assign to themselves).

**36.** To create the manual payment:

Step	Action
1	enter the NINO in top right hand side (RHS) box. The search results display
2	select the Benefit Delivery Case which is shown as PIP under the Details heading and Case under the Type heading. The PIP Benefit Case Evidence Summary screen displays
3	select the Financials tab
4	select Transactions from the LHS menu
5	select Manual Payment button on RHS. New Manual Payment Details screen displays
6	to create a manual payment record complete the following fields: <ul style="list-style-type: none"><li>• <b>Reference number</b> - input <b>0000000</b> (normally it would be the CPS LP reference number)</li><li>• <b>Amount</b> – this is the total amount of the death arrears which are due</li><li>• <b>Start Date</b> – this will be the date when the death arrears are due from</li></ul>

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	<ul style="list-style-type: none"><li>• <b>End Date</b> – this will be the end date of the period of death arrears due (usually the date of death)</li></ul>
7	<p>in the comments box clearly state that the payment is for death arrears that are due but the DAP does not wish to claim them. Include how the manual payment has been calculated giving details of the period, component, rates and the total amount due</p> <p><b>Note:</b> User must ensure period is accurate and within a cover period as PIP does not adhere to benefit weeks, for example; date of change is the same day affected</p>
8	select Save
9	the Manual Payment Confirmation screen displays, select Save

Spare paras 37-39

### Notification of death received post PIP decision for Working Age Claimant

**40.** When a task is received advising the DOD of a claimant, ensure that the DOD is held on PIPCS and consider whether PIP has been paid up to the DOD or whether an overpayment has occurred or money is due.

**See:** Overpayment Occurred Following the Death of the Claimant in this chapter

**See:** Money Due Following the Death of the Claimant in this chapter

### Overpayment Occurred Following the Death of the Claimant

**41.** If an overpayment has occurred please follow the guidance given in the Overpayments for DWP guidance.

**See:** Payment Correction – overpaid – Establish cause of Overpayment

**See:** Overpayments for DWP

**See:** Deceased cases – not DPAD within the Overpayments for DWP guidance

**See:** Direct Payment After Death overpayments within the Overpayments for DWP guidance

**See:** Direct Payment after Death – overpayment £25.00 or less within the Overpayments for DWP guidance

**See:** Direct Payment After Death – contact details received after case has been referred to Debt Management within the Overpayments for DWP guidance

**See:** Direct Payment After Death – Building Society accounts within the Overpayments for DWP guidance

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**See:** Overpayment following death and Motability Agreement in place in this chapter

### **Money Due Following the Death of the Claimant**

**42.** The CM must check entitlement and the award period to ensure they are correct. If money is due issue form PIP3049 (BR330) to Claimant's representative to confirm that they wish to receive any money due and to gather any details needed to finalise the case. These include:

- Death Arrears Payee - Name, address, Bank/Building Society account
- Details of any hospital or Care Home admissions that may affect payment

**See:** How to determine the Death Arrears Payee in this chapter

### **Notification of death received post PIP decision for State Pension Age or Pension Credit Qualifying Age Claimant**

**43.** When a task is received advising the DOD of a claimant, ensure that the DOD is held on PIPCS and consider whether PIP has been paid up to the DOD or whether an overpayment has occurred or money is due.

**See:** Overpayment Occurred Following the Death of the Claimant in this chapter

**See:** Money Due Following the Death of the Claimant in this chapter

**44.** Check CIS to see if they have State Pension (SP) or Pension Credit (PC) interest.

### **State Pension Age or Pension Credit Qualifying Age Claimant but No SP or PC Interest held on CIS**

**45.** Take action to finalise the PIP claim as for a Claimant of Working Age.

**See:** Notification of death received post PIP decision for Working Age Claimant in this chapter

### **Death notification received from Bereavement Service - Claimant is State Pension or Pension Credit Qualifying Age and PC or SP interest is held on CIS**

**46.** BS will gather details and input them straight into PTP CAM.

**47.** BS will check CIS and possibly PIPCS (Prospect Person) to determine if there is PIP interest.

**48.** When PIP interest found the BS will complete the BICT with all details gathered and send the email to PIP Mailbox. As per PSB 31/2013.

### **Notification from BS no arrears of PIP due**

**49.** DOD will be input on PIPCS by SPOC that receives the BICT email.

**50.** Email will be printed and sent to be scanned.

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**51.** Task will be received by a PIP user who will finalise the PIP case and note the PIP Communications record that 'DOD received from BS, no arrears due, case finalised no further enquiries needed'.

## **Notification from BS arrears of PIP due and no further enquiries need to be made**

**52.** PIP user will finalise the PIP case and note the PIPCS Communications Record 'DOD received from BS, arrears paid, case finalised'. The communications record can be viewed by TPS. If TPS have arrears due they can see PIP is not issuing a PIP3049 (BR330).

## **Notification from BS PIP arrears due and further enquiries need to be made**

**53.** PIP user must identify the correct Pension Centre (PC) by the claimant's post code and email the PC SPOC to determine if TPS have already started to make enquiries. The email must ask:

- that if TPS already have DAP details that a copy of the BR330 should be sent to PIP;
- if TPS have already started to make enquiries to establish the DAP, that they note their system to send a copy of the BR330 to PIP when it is received;
- if TPS are not issuing a BR330 they should reply stating BR330 not being issued and if they have details of a surviving spouse or civil partner these should be included in their reply to PIP; and
- if TPS do require a copy of form BR330 but have not yet started making enquiries they should note their reply to PIP to request PIP send a copy of BR330 when received

**See:** Identify PC by post code

**See:** PC SPOC list in this chapter

**54.** PIP user should defer their task for 2 days to await a reply by email.

## **Notification from BS TPS already have all the details**

**55.** The PC SPOC will reply by email that they are sending a copy of their form BR330 to PIP. The PIP user must:

Step	Action
1	complete the Communications Record with the action taken
2	defer their task for 2 weeks to await the task containing the BR330 image.

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### Notification from BS TPS have not yet started to make enquiries

**56.** If the PC SPOC advises by return email that they have not started to make enquiries but do require a copy of the BR330 the PIP user must:

Step	Action
1	issue form PIP3049 (BR330)
2	defer task for 2 weeks to await return of form PIP3049 (BR330)
3	complete a Communications Record on PIPCS and note it 'PIP3049 (BR330) issued – details also required by TPS' <b>See:</b> Create a Communications Record within the Workflow and Task Management chapter of PIPCS guidance
4	when PIP3049 (BR330) received: <ul style="list-style-type: none"><li>• print a copy of the PIP3049 (BR330) image</li><li>• annotate it clearly with 'FOR PENSION SERVICE'</li><li>• send it in a purple polylope to TPS MOU</li></ul> <b>See:</b> PC SPOC list in this chapter for correct courier address <ul style="list-style-type: none"><li>• note PIPCS Communication Record 'copy of PIP3049 (BR330) sent to TPS'.</li></ul>

### Notification from BS TPS has already started to make enquiries

**57.** If the PC SPOC confirms that they have already issued form BR330 and will send a copy to PIP when they receive it, the PIP user must:

Step	Action
1	complete the Communications Record with the action taken
2	defer task for 3 weeks to await the task containing the BR330 image.

Spare paras 58-69

### Death received from Tell Us Once by email

**70.** TUO notifications via CRS are received by the BS who will check CIS and PIPCS (for Prospect Person). When PIP interest found they will send an email to PIP SPOC with the TUO details attached.

### Notification from TUO no arrears of PIP due

**71.** DOD will be input on PIPCS by SPOC that receives the TUO email.

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**72.** Email will be printed and sent to be scanned.

**73.** Task will be received by a PIP user who will finalise the PIP case and note the PIP Communications record that 'DOD received from TUO, no arrears due, case finalised no further enquiries needed'. This is then available for TPS to view.

## **Notification from TUO arrears of PIP due and no further enquiries need to be made**

**74.** PIP user will finalise the PIP case and note the PIP communications record 'DOD received from TUO, arrears paid, case finalised'.

**Please note** – this scenario is unlikely to happen as TUO emails do not include DAP details

## **Notification from TUO PIP arrears due and further enquiries need to be made**

**75.** PIP user must identify the correct Pension Centre (PC) by the claimant's post code and email the PC SPOC to determine if TPS have already started to make enquiries. The email must ask:

- that if TPS already have DAP details that a copy of the BR330 should be sent to PIP;
- if TPS have already started to make enquiries to establish the DAP, that they note their system to send a copy of the BR330 to PIP when it is received;
- if TPS are not issuing a BR330 they should reply stating BR330 not being issued and if they have details of a surviving spouse or civil partner these should be included in their reply to PIP; and
- if TPS do require a copy of form BR330 but have not yet started making enquiries they should note their reply to PIP to request PIP send a copy of BR330 when received

**See:** Identify PC by post code

**See:** PC SPOC list in this chapter for phone numbers

**76.** PIP user should defer their task for 2 days to await a reply by email.

## **Notification from TUO TPS already have all the details**

**77.** The PC SPOC will reply by email that they are sending a copy of their form BR330 to PIP. The PIP user must:

Step	Action
1	complete the Communications Record with the action taken

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2	defer their task for 2 weeks to await the task containing the BR330 image.
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### **Notification from TUO TPS have not yet started to make enquiries**

**78.** If the PC SPOC advises by return email that they have not started to make enquiries but do require a copy of the BR330 the PIP user must:

Step	Action
1	issue form PIP3049 (BR330)
2	defer task for 2 weeks to await return of form PIP3049 (BR330)
3	complete a Communications Record on PIPCS and note it 'PIP3049 (BR330) issued – details also required by TPS' <b>See:</b> Create a Communications Record within the Workflow and Task Management chapter of PIPCS guidance
4	when PIP3049 (BR330) received: <ul style="list-style-type: none"><li>• print a copy of the PIP3049 (BR330) image</li><li>• annotate it clearly with 'FOR PENSION SERVICE'</li><li>• send it in a purple polylope to TPS MOU</li><li>• <b>See:</b> PC SPOC list in this chapter for correct courier address</li><li>• note PIPCS Communication Record 'copy of PIP3049 (BR330) sent to TPS'.</li></ul>

### **Notification from TUO TPS has already started to make enquiries**

**79.** If the PC SPOC confirms that they have already issued form BR330 and will send a copy to PIP when they receive it, the PIP user must:

Step	Action
1	complete the Communications Record with the action taken
2	defer task for 3 weeks to await the task containing the BR330 image.

### **Death received by CIS Broadcast Claimant is Pension Age and Pension Credit PC or State Pension SP interest is held on CIS**

#### **Notification from CIS no arrears of PIP due**

**80.** Task will be received by a PIP user who will finalise the PIP case and note the PIP Communications record that 'DOD received by CIS broadcast, no arrears due, case finalised no further enquiries needed'.

#### **Notification from CIS arrears of PIP due and further enquiries need to be made**

**81.** PIP user must identify the correct Pension Centre (PC) by the claimant's post code and email the PC SPOC to determine if TPS have already started to make enquiries. The email must ask:

- that if TPS already have DAP details that a copy of the BR330 should be sent to PIP;
- if TPS have already started to make enquiries to establish the DAP, that they note their system to send a copy of the BR330 to PIP when it is received;
- if TPS are not issuing a BR330 they should reply stating BR330 not being issued and if they have details of a surviving spouse or civil partner these should be included in their reply to PIP; and
- if TPS do require a copy of form BR330 but have not yet started making enquiries they should note their reply to PIP to request PIP send a copy of BR330 when received

**See:** Identify PC by post code

**See:** PC SPOC list in this chapter for phone numbers

**82.** PIP user should defer their task for 2 days to await a reply by email.

#### **Notification from CIS TPS already have all the details**

**83.** The PC SPOC will reply by email that they are sending a copy of their form BR330 to PIP. The PIP user must:

Step	Action
1	complete the Communications Record with the action taken
2	defer their task for 2 weeks to await the task containing the BR330 image

#### **Notification from CIS TPS have not yet started to make enquiries**

**84.** If the PC SPOC advises by return email that they have not started to make enquiries but do require a copy of the BR330 the PIP user must:

## PIP User Guide

Step	Action
1	issue form PIP3049 (BR330)
2	defer task for 2 weeks to await return of form PIP3049 (BR330)
3	complete a Communications Record on PIPCS and note it 'PIP3049 (BR330) issued – details also required by TPS' <b>See:</b> Create a Communications Record within the Workflow and Task Management chapter of PIPCS guidance
4	when PIP3049 (BR330) received: <ul style="list-style-type: none"><li>• print a copy of the PIP3049 (BR330) image</li><li>• annotate it clearly with 'FOR PENSION SERVICE'</li><li>• send it in a purple polylope to TPS MOU</li></ul> <b>See:</b> PC SPOC list in this chapter for correct courier address <ul style="list-style-type: none"><li>• note PIPCS Communication Record 'copy of PIP3049 (BR330) sent to TPS'.</li></ul>

### Notification from CIS TPS has already started to make enquiries

**85.** If the PC SPOC confirms that they have already issued form BR330 and will send a copy to PIP when they receive it, the PIP user must:

Step	Action
1	complete the Communications Record with the action taken
2	defer task for 3 weeks to await the task containing the BR330 image.

### Death received by post Claimant is Pension Age and PC or SP interest is held on CIS

#### Notification by post no arrears of PIP due

**86.** Task will be received by a PIP user who will finalise the PIP case and note the PIP Communications record that 'DOD received by white mail, no arrears due, case finalised no further enquiries needed'. The PIP user must also record any details from the post that could be used by TPS in the communications record. TPS will be able to view these details on PIPCS.

## PIP User Guide

### **Notification by post arrears of PIP due and no further enquiries need to be made**

**87.** PIP user will finalise the PIP case and note the PIP communications record 'DOD received by white mail, arrears paid, case finalised'. The name and address of the DAP must be included in the Communications Record for use by TPS.

### **Notification by post PIP arrears due and further enquiries need to be made**

**88.** PIP user must identify the correct Pension Centre (PC) by the claimant's post code and email the PC SPOC to determine if TPS have already started to make enquiries. The email must ask:

- that if TPS already have DAP details that a copy of the BR330 should be sent to PIP;
- if TPS have already started to make enquiries to establish the DAP, that they note their system to send a copy of the BR330 to PIP when it is received;
- if TPS are not issuing a BR330 they should reply stating BR330 not being issued and if they have details of a surviving spouse or civil partner these should be included in their reply to PIP; and
- if TPS do require a copy of form BR330 but have not yet started making enquiries they should note their reply to PIP to request PIP send a copy of BR330 when received

**See:** Identify PC by post code

**See:** PC SPOC list in this chapter for phone numbers

**89.** PIP user should defer their task for 2 days to await a reply by email.

### **Notification by post TPS already have all the details**

**90.** The PC SPOC will reply by email that they are sending a copy of their form BR330 to PIP. The PIP user must:

Step	Action
1	complete the Communications Record with the action taken
2	defer their task for 2 weeks to await the task containing the BR330 image.

### **Notification by post TPS have not yet started to make enquiries**

**91.** If the PC SPOC advises by return email that they have not started to make enquiries but do require a copy of the BR330 the PIP user must:

## PIP User Guide

Step	Action
1	issue form PIP3049 (BR330)
2	defer task for 2 weeks to await return of form PIP3049 (BR330)
3	complete a Communications Record on PIPCS and note it 'PIP3049 (BR330) issued – details also required by TPS' <b>See:</b> Create a Communications Record within the Workflow and Task Management chapter of PIPCS guidance
4	when PIP3049 (BR330) received: <ul style="list-style-type: none"><li>• print a copy of the PIP3049 (BR330) image</li><li>• annotate it clearly with 'FOR PENSION SERVICE'</li><li>• send it in a purple polylope to TPS MOU</li></ul> <b>See:</b> PC SPOC list in this chapter for correct courier address <ul style="list-style-type: none"><li>• note PIPCS Communication Record 'copy of PIP3049 (BR330) sent to TPS'.</li></ul>

### Notification by post TPS has already started to make enquiries

**92.** If the PC SPOC confirms that they have already issued form BR330 and will send a copy to PIP when they receive it, the PIP user must:

Step	Action
1	complete the Communications Record with the action taken
2	defer task for 3 weeks to await the task containing the BR330 image

Spare paras 93-94

### Death notification received by phone Claimant is Pension Age and PC or SP interest is held on CIS

**95.** Any death notifications received by telephone in PIP should be redirected to the DWP Bereavement Service (BS). This is advantageous for the caller because the BS offers a check for any potential benefit eligibility and if requested can take an electronic claim for Bereavement Benefits and/or Social Fund Funeral Payment that the caller may be entitled to.

**96.** If the caller insists on reporting the details of the death and refuses to call the BS the PIP agent will:

Step	Action
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## PIP User Guide

1	gather contact details from the caller
2	create a task for the Benefit Delivery Team to make any further enquiries as necessary.

**97.** When the task is received on the Benefit Delivery Team:

**See:** Death notified by post in this chapter

Spare paras 98-99

### Inputting Death Arrears Payee Personal Details to PIPCS

**100.** To input the DAP details to PIPCS take the following action:

Step	Action
1	from the Person Homepage select the Background tab
2	select Relationships from LHS menu
3	select New shown with a star. New Relationship screen displays
4	select the magnifying glass icon next to the Related Party field. External Party screen displays
5	input the DAP's NINO in the Reference field. This is mandatory so NINO must be obtained
6	click on Search. Details of the DAP display or Error Message 'there are no matching items based on the search criteria entered' displays. This Error message means the NINO entered is not held on PIPCS and must be entered as an External Party before continuing to input DAP details <b>See:</b> Creating an External Party in this chapter
7	click on Select on the LHS of the DAP's details. New Relationship screen displays showing the DAP's name in the Related Party field
8	select Death Arrears Payee from the drop down menu in the Type field
9	select Yes from the Verification field drop down menu
10	click Save.

### Creating an External Party

**101.** To input the DAP details to PIPCS take the following action:

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Step	Action
1	from the shortcuts menu on the LHS, click on Registration
2	click on external party from LHS menu
3	input the DAP's NINO in the Reference field. This is mandatory so NINO must be obtained. Select Type from the drop down menu (personal or corporate)
4	click on Search. Error Message 'there are no matching items based on the search criteria entered' displays
5	click on Next and a confirmation screen will display asking if you want to create an External Party
6	check the details are correct and click Save
7	Follow the guidance above to input the DAP details <b>See:</b> Inputting Death Arrears Payee Personal Details to PIPCS in this chapter

### Inputting Bank Account Details for Death Arrears Payee to PIPCS

**102.** This action must be undertaken by an AA. A Task must be created and referred to an AA to request the DAP's bank account details to be input.

**See:** How to create a manual task User within the Workflow and Task Management chapter of PIPCS guidance

**103.** To input the DAP's bank account details to PIPCS take the following action:

Step	Action
1	from the Person Homepage select the Financials tab
2	select Bank Accounts from LHS menu
3	click on the green Action button from alongside the existing bank account and select Edit from the drop down menu. Edit Bank Account screen displays
4	complete the Account Name field with the name shown on the bank account. This must be a maximum of 35 characters

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5	select Bank Account from the drop down menu in the Account Type field
6	input the DOD in the From date field
7	complete the Account Details, this includes Account Number, Sort Code or Roll Number
8	select Save. PIPCS will then validate the information with the Bank Wizard
9	if the bank wizard does not work and the bank account details do not update create a To Do task bank wizard not working <b>See:</b> How to create a manual task User within the Workflow and Task Management chapter of PIPCS guidance

**104.** You must now create a task back to the Case Worker to arrange payment of the death arrears.

### **Paying arrears of PIP to the Death Arrears Payee**

**Please Note:** Before paying any arrears of PIP following the death of the claimant, a verified Date of Death must be held on PIPCS.

**105.** When the DAP's personal details and bank account details are held on PIPCS you must lift any suspensions held. A Nominee Suspension will be set on all cases and you must also check to see if there is a Component Level Suspension which must also be lifted.

**See:** Component Level Suspensions and Nominee Automatic Suspensions

### **If no cancelled payments held on PIPCS and the Paid Up To Date is before the DOD**

**106.** PIPCS will issue arrears overnight to the DAP.

**107.** A clerical letter PIP4009 must be sent to the DAP to confirm the arrears issued to them. To complete PIP 4009 with the correct details you must set a task for one day and obtain the details of the arrears paid from PIPCS.

**See:** Completing form PIP4009 to Issue to DAP when Death Arrears Paid in this chapter

### **Completing form PIP4009 to Issue to DAP when Death Arrears Paid**

**108.** To complete form PIP 4009 you must obtain the details of the arrears payment from PIPCS:

Step	Action
------	--------

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1	from the Benefit Case select the Financials tab from across the top
2	select Transactions from LHS menu
3	click on the arrow on the LHS of the top payment. Details of the death arrears payment made overnight display
4	use Amount and Covers Period to complete PIP 4009 notification
5	a copy of clerical form PIP4009 must be printed and sent to MOU to be scanned into DRS <b>See:</b> Sending Hard Copy Documents to be Scanned
6	complete the PIP Communication Record to show details of payment issued to DAP on form PIP4009

### **Cancelled Payment reason Beneficiary Deceased received before DOD input on PIPCS**

**109.** A task will be received on the Benefit Delivery Team notifying the return of the cancelled payment.

**110.** You must attempt to invalidate the cancelled payment before taking action to remove PAB, inputting the DOD and a Component Level Suspension.

**See:** ARUC guidance

### **Cancelled payment reason Beneficiary Deceased received after DOD input on PIPCS**

**111.** A task will be received on the Benefit Delivery Team notifying the cancelled payment.

**112.** You must attempt to invalidate the cancelled payment. This will ensure the correct payment is calculated on PIPCS when evidence has been reassessed.

**See:** ARUC guidance

**113.** If the cancelled payment cannot be invalidated and death arrears are due within the cancelled payment period, the user must determine the period and amount due so a manual payment can be issued.

**See:** Issuing a Manual Payment

### **Payment returned after death**

**114.** When a payment is returned after the DOD:

**See:** ARUC guidance

Spare paras 115-119

# PIP User Guide

**Form BD8 or copy of death certificate is presented at any DWP office and the claimant has a PIP interest on CIS**

**120.** If someone presents form BD8 or a death certificate at any DWP office to report the death of a PIP claimant, the DWP office must copy the claimants details, date of death and details of the person dealing with the deceased's estate into an email and send it to the appropriate PIP bereavement e mail address below. The BD8 or death certificate must be returned to the person presenting it.

- xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxk
- xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx - This address is for Special Customer Records only

[Contact email address redacted - Exclusion 40 applied: Personal information]

## Death of a PAB

**121.** If you are notified of the death of a PAB, a new appointment must be made.

**See:** Death of an appointee

## Spare paras 122-149

**Solicitor dealing with estate contacts you for details of PIP**

**150.** Following the death of a claimant, their solicitor may contact you asking for payment details of PIP within a specified period (for tax purposes). In these cases you should:

Step	Action
1	complete and issue form PIP0119 to the solicitor
2	a copy of clerical form PIP0119 must be printed and sent to MOU to be scanned into DRS <b>See:</b> Sending Hard Copy Documents to be Scanned
3	complete the PIP Communication Record to show “details of payment issued to claimant’s solicitor on form PIP0119”.

Spare paras 151-201

### Representative contacts you after the case has been closed

### Award record cleared and arrears not paid

**202.** If the case has been closed with arrears outstanding because no DAP could be found take the following action:

## PIP User Guide

Step	Action
1	if the customer died more than 12 months ago the DAP may have lost their right to payment. To find out if you can make payment <b>See:</b> Failure to obtain payment - guidance to be added at a later date
2	if the customer died less than 12 months ago, arrears can be paid to the DAP.

**203.** If arrears are payable:

Step	Action
1	send form PIP3049 (BR330) to the claimant's representative
2	create a 10 day task for the return of PIP3049 (BR330)
3	when form PIP3049 (BR330) received. <b>See:</b> Paying arrears of PIP to the Death Arrears Payee in this chapter

**Spare paras 204-205**

### **Outstanding Claim Closed as no Representative Established**

**206.** If you receive a request about an outstanding claim:

Step	Action
1	complete form PIP0305 for the TL's signature
2	refer the case to the TL.

**207.** When you receive the case back from the TL send PIP0305 to MOU to be scanned and continue action as for a normal outstanding claim after death.

### **Outstanding Unplanned Intervention**

**208.** If you receive a request about an outstanding unplanned intervention:

Step	Action
1	complete form PIP0305 for the TL's signature
2	refer the case to the TL.

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**209.** When you receive the case back from the TL send PIP0305 to MOU to be scanned and continue action as for a normal outstanding claim after death.

### Outstanding Appeal

**210.** If you receive an enquiry about an outstanding appeal you must notify HMCTS after checking that the enquirer is the person appointed on PIP0305. If they are not the person appointed, refer the case to your TL.

### Notification received that DOD needs removing

**211.** If a notification is received notifying a removal of DOD is required:

Step	Action
1	establish what action has been taken following the initial notification
2	if any forms or requests have been sent to a representative in connection with the incorrect CIS notification, discuss the appropriate action urgently with the TL.
3	PIP user to Access Person record on PIPCS
4	select Edit
5	remove date of death and verification
6	select Save
7	PIPCS creates a management check to the TL

See: Management Check guidance

# PIP User Guide

## Pension centre SPOC list

[Contact telephone numbers, postal and email addresses redacted - Exclusion 40 applied: Personal information]

Pension Centre	Bereavement SPOC	E-mail Address	Internal Courier Address for Scanning	MOU Address
Burnley	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
Cwmbran	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
Dundee	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
Leicester	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
Newcastle Pension Centre (London Pension Centre)	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX

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<b>Motherwell</b>	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
<b>Seaham</b>	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
<b>Swansea</b>	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX
<b>Warrington</b>	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX