NHS Pensions – Adult dependant’s pension – Death in membership

A member is automatically covered by the Schemes life assurance benefits from the day they join. An adult dependant’s pension is payable when a member dies whilst still a member of the scheme. A surviving partner can be:

- a legal spouse
- a registered civil partner
- a nominated partner from 1 April 2008

Initial adult dependant’s pension

When a member dies in pensionable employment and leaves a surviving partner with entitlement to an adult dependant’s pension, an initial adult dependant’s pension is payable.

The employer will pay an initial adult dependant’s pension if the member was legally married, or in a registered Civil Partnership. Since 5 December 2005 members of the same sex have been able to register a Civil Partnership, which gives legal recognition to their relationship.

If a member dies on or after 1 April 2008 and has pensionable membership on or after 1 April 2008 then this initial adult dependant’s pension is paid for 6 months irrespective of whether there are eligible dependent children or not. It is paid from the day after death and the payment is recorded on form AW135, which should be sent to NHS Pensions with the adult dependant’s pension benefit application form AW9. The employer can claim back the initial adult dependant’s pension from NHS Pensions using form Fin 9.

Since 1 April 2008 the Scheme has been amended to provide for a nominated qualifying partner to receive an adult dependant’s pension. If the member has made a partner nomination, NHS Pensions will authorise the payment of the initial adult dependant’s pension after:

- verifying evidence provided that shows financial interdependency is proven
- verifying that the relationship satisfied all other eligibility conditions.

The initial adult dependant’s pension is payable at the same rate of pensionable pay as the member was receiving on the day they died.
Continuing adult dependant’s pensions

If a member has at least two years membership when they die a continuing adult dependant’s pension is payable.

Widows will get half the pension the member would have received if they had retired on ill health (Tier 2) on the date of death.

Widowers, civil partners and nominated partners will receive half the pension the member would have received if they had retired on ill health grounds (Tier 2) on the date of death, for their membership from 6 April 1988 only.

Note

Any member of the 1995 Section of the Scheme with membership before 6 April 1988 had a time-limited opportunity to buy an Increased Survivor Pension for their nominated partner. This option was available until 30 June 2009.

If a member has scheme membership on or after 1 April 2008 an adult dependant’s pension is paid for life and does not stop if the surviving partner marries, enters into a civil partnership or cohabits.

If a member does not have scheme membership on or after 1 April 2008 an adult dependant’s pension will normally end if the surviving partner marries, enters into a civil partnership or cohabits.

Employer action

- Adult dependant’s pension application forms can be downloaded from our website at www.nhsbsa.nhs.uk/pensions
- If the deceased member has a surviving partner, please give them form AW9 and a payment application form G60. If there are dependant children, please give form AW158 to apply for children’s pension.
- Ensure that the members date of birth has been verified on Pensions Online (POL), but if not then request sight of the members birth certificate with the claim form.
- When you receive the completed claim forms, please check that they are fully completed, including the name of the Personal Representative, and signed and witnessed at parts 2 and 3.
• Close the members record down on POL on the date of death with an exit code 14. Remember to record any disallowed days for no pay sick.

• Complete the pay details at Part 4 of the claim form. If the member had outstanding annual leave it should be included in the pay period. If there are any no pay sick disallowed days these should be noted on the form.

• At Part 5 please verify all relevant dates by sight of original certificates.

• If the member had a nominated partner, ensure 2 forms of original evidence giving proof of financial interdependency are sent to us with the claim form. Examples of evidence are listed on page 2 of the form.

• If the surviving partner is a spouse or civil partner, remember to send a completed form AW135 giving details of the Initial Survivor Pension paid at Part 5.4.

• If a nominated partner, then state the amount of Initial Survivor Pension you would have paid if there had been a spouse at Part 5.5

• Sign, date and stamp the declaration at Part 5.6.

• Send the completed claim forms AW9, G60 and AW135 or supporting evidence to NHS Pensions, together with form AW158 if there is a claim for children’s pension.