



## DEATH NOTICE GUIDELINES

### GUIDELINES FOR COMMUNICATION ACROSS CAMPUS

#### UNIVERSITY OF BRITISH COLUMBIA, OKANAGAN CAMPUS

In a large organization, such as UBC Okanagan, it is inevitable that deaths will occur amongst our staff, faculty and students. It is important that this type of event is handled with sensitivity. The following is a guideline of steps to follow and departments to contact when this situation arises.

### Death of a Staff or Faculty Member

**Follow steps 1-11 for active employees (including employees on leave and student employees)**

**Follow steps 1-5 and 11 for inactive or retired employees**

**Person Notified of Death:**

| 1. Contact the Department Head, Director or Manager (Administrative Head of Unit)  |                          |
|--|--------------------------|
| <ul style="list-style-type: none"> <li>Notify the Administrative Head of Unit of the passing of an employee (including: correct name, date of death, position and department)</li> </ul> | <input type="checkbox"/> |

**Administrative Head of Unit:**

| 2. Responsibilities for Department/Unit/Faculty  |                          |
|--|--------------------------|
| <ul style="list-style-type: none"> <li>Prepare communication plan for colleagues and discuss with the family</li> <li>Arrange to meet with staff and or faculty</li> <li>Consider tribute on department/unit/faculty webpage</li> </ul>  | <input type="checkbox"/> |
| 3. Contact the Office of the Deputy Vice-Chancellor and Principal (DVC Office)   |                          |
| <ul style="list-style-type: none"> <li>DVC Office will send a letter of condolence to the family</li> <li><b>Contact:</b> Cara Kirkey, Administrative Assistant (<a href="mailto:cara.kirkey@ubc.ca">cara.kirkey@ubc.ca</a>)</li> </ul>  | <input type="checkbox"/> |
| 4. Contact Ceremonies and Events   |                          |
| <ul style="list-style-type: none"> <li>Please contact Ceremonies and Events to discuss options for lowering the flags <i>prior</i> to offering this option to the family</li> <li>Ceremonies and Events will post, on the <a href="#">flag lowering webpage</a>, information about flag lowering and any planned formal services</li> <li><b>Contact:</b> Alanna Vernon, Associate Director, Ceremonies and Events (<a href="mailto:alanna.vernon@ubc.ca">alanna.vernon@ubc.ca</a>)</li> </ul> | <input type="checkbox"/> |
| 5. Contact University Relations  |                          |
| <ul style="list-style-type: none"> <li>Discuss plans for notification to the campus community</li> <li>University relations will link to the flag lowering information and an online tribute or memorial message, if applicable, from the Okanagan campus home page</li> <li><b>Contact:</b> Bud Mortenson, Director, University Relations (<a href="mailto:bud.mortenson@ubc.ca">bud.mortenson@ubc.ca</a>)</li> </ul>   | <input type="checkbox"/> |



|   |                          |
|---|--------------------------|
| <b>6. Contact Human Resources</b>   |                          |
| <ul style="list-style-type: none"> <li>Inquire about general benefits and pension information (See <b>page 4</b> for further instructions on Pension and Benefits forms to be processed)</li> <li><b>Contact:</b> HR Relocation and Benefits Associate, Jacky Ivans (<a href="mailto:jacky.ivans@ubc.ca">jacky.ivans@ubc.ca</a>)</li> </ul>   | <input type="checkbox"/> |
| <b>7. Contact Payroll</b>   |                          |
| <ul style="list-style-type: none"> <li>Administrator must process an ePAF with the Action/Reason of Termination – Death as soon as possible to avoid overpayment</li> <li><b>Contact:</b> Paula Lambert, Payroll and Benefits Specialist (<a href="mailto:paula.lambert@ubc.ca">paula.lambert@ubc.ca</a>) or Brydie Chamberlain, Payroll and Benefits Administrator (<a href="mailto:brydie.chamberlain@ubc.ca">brydie.chamberlain@ubc.ca</a>)</li> </ul>   | <input type="checkbox"/> |
| <b>8. Contact Security</b>  |                          |
| <ul style="list-style-type: none"> <li>Remove Salto Key access by emailing <a href="mailto:security.salto@ubc.ca">security.salto@ubc.ca</a> stating the date you want the key deleted</li> </ul>  | <input type="checkbox"/> |
| <b>9. Personal Belongings</b>   |                          |
| <ul style="list-style-type: none"> <li>The department/unit/faculty is responsible for the collection and storage of belongings as well as for making arrangements with the family for delivery or collection</li> </ul>   | <input type="checkbox"/> |
| <b>10. Provide Contact Information for the Employee and Family Assistance Program (EFAP)</b>  |                          |
| <ul style="list-style-type: none"> <li>EFAP provides both short-term clinical counselling and work/life consultations to all eligible UBC employees and their dependent family members</li> <li>EFAP can be a resource for both the grieving family of the employee, and for fellow staff members and colleagues</li> <li>Call the Care Access Centre at 1-800-387-4765</li> <li><a href="http://www.hr.ubc.ca/wellbeing-benefits/benefits/details/employee-family-assistance-program/">http://www.hr.ubc.ca/wellbeing-benefits/benefits/details/employee-family-assistance-program/</a></li> </ul> | <input type="checkbox"/> |
| <b>11. Contact Development and Alumni Engagement</b>  |                          |
| <ul style="list-style-type: none"> <li>Family or department may inquire about formal donations to UBC (e.g. scholarship, award or project)</li> <li><b>Contact:</b> Lesley Langton, Development Assistant (<a href="mailto:lesley.langton@ubc.ca">lesley.langton@ubc.ca</a>)</li> </ul>   | <input type="checkbox"/> |

## Death of a Student

### Person Notified of Death:

|   |                          |
|---|--------------------------|
| <b>1. Contact Deputy Registrar, Enrolment Services</b>  |                          |
| <ul style="list-style-type: none"> <li>Notify of the passing of a student (including: correct name, date of death, and program)</li> <li><b>Contact:</b> Diane MacBride, Assistant to Deputy Registrar, Enrolment Services (<a href="mailto:diane.macbride@ubc.ca">diane.macbride@ubc.ca</a>) on behalf of Fred Vogt</li> <li>The Assistant to the Deputy Registrar, Enrolment Services will notify the following areas:             <ul style="list-style-type: none"> <li>○ Faculty the student was registered in</li> <li>○ DVC Office</li> <li>○ AVP Students Office</li> </ul> </li> </ul> | <input type="checkbox"/> |



|  |   |
|--|---|
| <ul style="list-style-type: none"> <li>○ Alumni Office</li> <li>○ Student Financial Assistance and Awards</li> <li>○ Undergraduate Admissions</li> <li>○ Housing</li> <li>○ UBCV Enrolment Services (RecReg)</li> </ul>  |   |
| <b>2. Contact Health and Wellness</b>  |   |
| <ul style="list-style-type: none"> <li>● Prepare communication plan for colleagues</li> <li>● Contact family to discuss communication plan</li> <li>● Arrange for support for students, staff and/or faculty (immediate and long term supports)</li> <li>● <b>Contact:</b> Roger Wilson, Director, Health and Wellness (<a href="mailto:roger.g.wilson@ubc.ca">roger.g.wilson@ubc.ca</a>)</li> </ul>   | □ |
| <b>3. Contact Ceremonies and Events</b>  |   |
| <ul style="list-style-type: none"> <li>● Please contact Ceremonies and Events to discuss options for lowering the flags <i>prior</i> to offering this option to the family</li> <li>● Ceremonies and Events will post, on the <a href="#">flag lowering webpage</a>, information about flag lowering and any planned formal services</li> <li>● <b>Contact:</b> Alanna Vernon, Associate Director, Ceremonies and Events (<a href="mailto:alanna.vernon@ubc.ca">alanna.vernon@ubc.ca</a>)</li> </ul> | □ |
| <b>4. Contact University Relations</b>   |   |
| <ul style="list-style-type: none"> <li>● Discuss plans for notification to the campus community</li> <li>● University relations will link to the flag lowering information and an online tribute or memorial message, if applicable, from the Okanagan campus home page</li> <li>● <b>Contact:</b> Bud Mortenson, Director, University Relations (<a href="mailto:bud.mortenson@ubc.ca">bud.mortenson@ubc.ca</a>)</li> </ul>   | □ |



## ATTACHMENT TO DEATH NOTICE GUIDELINES

### Basic Life Insurance:

- The Benefits Desk in Vancouver will send the beneficiary a Life Insurance Claim form titled “Election of Method of Settlement and Statement of Claim”
- The Benefits Desk requires the original or certified copy of the death certificate
- The Benefits Desk will send the completed form and required documents to Sun Life (allow 4-6 weeks for processing from the date all information is received by Sun Life)

### Pension:

- HR Benefit Desk (Vancouver) will contact Sun Life
- Sun Life will send the pension plan package and instructions on how to transfer it to the beneficiary
- Once the pension account is transferred to the beneficiary, the individual can contact the UBC Pension office (Vancouver) for counselling on how to manage the pension income (pension contact information will be included in the Sun Life package)

### Benefits:

- The Benefits Desk will send a letter to the beneficiary explaining when *benefits will end* (first of the month following the first of the month from date of death), information on the *Retirement and Survivor Benefits plan* if they wish to enrol and the *Canada Pension Plan* death benefit

| Contacts  |   |
|---|---|
| Pension Administration Office   | Benefits Office   |
| <p><b>Faculty:</b><br/>Lorraine Heseltine<br/>Member Services Specialist - Faculty Pension Plan<br/>604-822-3485<br/><a href="mailto:lorraine.heseltine@ubc.ca">lorraine.heseltine@ubc.ca</a></p> <p><b>Staff:</b><br/>Margaret Leathley<br/>Pension Administrator<br/>604-822-8119<br/><a href="mailto:margaret.leathley@ubc.ca">margaret.leathley@ubc.ca</a></p> <p>(also contact Shirley Sato, Terminations Information, in the case of pre-retirement death benefits: <a href="mailto:shirley.sato@ubc.ca">shirley.sato@ubc.ca</a>)</p> | <p>Janet McHugh<br/>Benefits Specialist<br/>604-822-6823<br/><a href="mailto:janet.mchugh@ubc.ca">janet.mchugh@ubc.ca</a></p> <p><b>OR</b></p> <p>Florence Lum<br/>Benefits Associate<br/>604-822-8988<br/><a href="mailto:florence.lum@ubc.ca">florence.lum@ubc.ca</a></p> |

### Human Resources' Role:

- Follows up with department/unit/faculty for Transfer and Severance form or ePAF (including confirmation of vacation owing)
- Supports Pension and Benefits Offices regarding the deceased to provide any information that is required (i.e. original, signed beneficiary forms from file)
- Informs the applicable Union or Association of the passing of the employee