Death of Medicaid Recipient

Death can be reported by a family member, provider, other third-party, the Buy-In Unit, or through an interface with the Oregon Health Department. If the information comes from the interface and a date of death record was not already added to the case, a Report on Death of Individual task will be created if the deceased individual is the head of household (HOH), and there are other people on the case (we'll talk more about this task later on).

Although it's not required, it is best practice to check the Oregon Vital Events Registration System (OVERS) when receiving a report of death from a third party. See the OVERS Quick Reference Guide for more information.

If a death occurs while an application is still pending, ONE will approve benefits correctly (including retroactive benefits); there is no need to remove the DOD and add it back later. See below for instructions if the individual applied for services and they are also pending.

> **REMEMBER**
> There is no need to request additional verification when a death is reported by a third party unless the information is questionable, or the reporter did not provide an actual date.

Deceased Is Receiving Services

Because ONE will try to act on a service record ending and send notices to a deceased individual, <u>it is important that the eligibility worker update the ONE case *before* the service case manager ends the service benefit in SELG.</u>

Deceased Applied for Services and Eligibility is Pending

If medical and services are both pending when the applicant passes away, contact the APD/AAA case manager to obtain the service eligibility decision. If eligible, the case manager must approve the service benefit and plan in ACCESS prior to entering a DOD in ONE. Once the SELG record is received, the DOD can be entered into ONE and eligibility can be run.

Important Information from the EAU

- If you speak to family or friends of the deceased, encourage the individual handling the deceased's affairs to contact the EAU (Estate Administration Unit) at 503-378-2884 or estate.admin@dhsoha.state.or.us before disposing of assets or spending any of the deceased's money.
- Please make sure the following financial information in ONE is up to date before running eligibility and authorizing the termination of benefits:

- Bank Account Information, including account numbers, bank names, and noting if you are aware of any copies of bank statements on file (including in EDMS).
- Information regarding prepaid burial plans or arrangements and noting if copies of documents are on file.
- Trusts, and noting whether there is a copy of the trust on file.
- Noting whether you think the recipient may have a disabled or blind child of any age, or a minor child under 21 years. A name and an address would be helpful. It is not necessary to confirm the disability or age of the child; the EAU will do that.
- Narrate in case notes any other information you think may be important to the EAU. If it is urgent, a quick phone call or email to the EAU is appropriate (contact info is above).

You are not expected to spend a lot of time gathering this information; merely noting that you have acquired this information along the way is extremely helpful.

Keep a deceased household member on the case

There are several scenarios in which a deceased household member should remain on the case. These reasons include, but are not limited to:

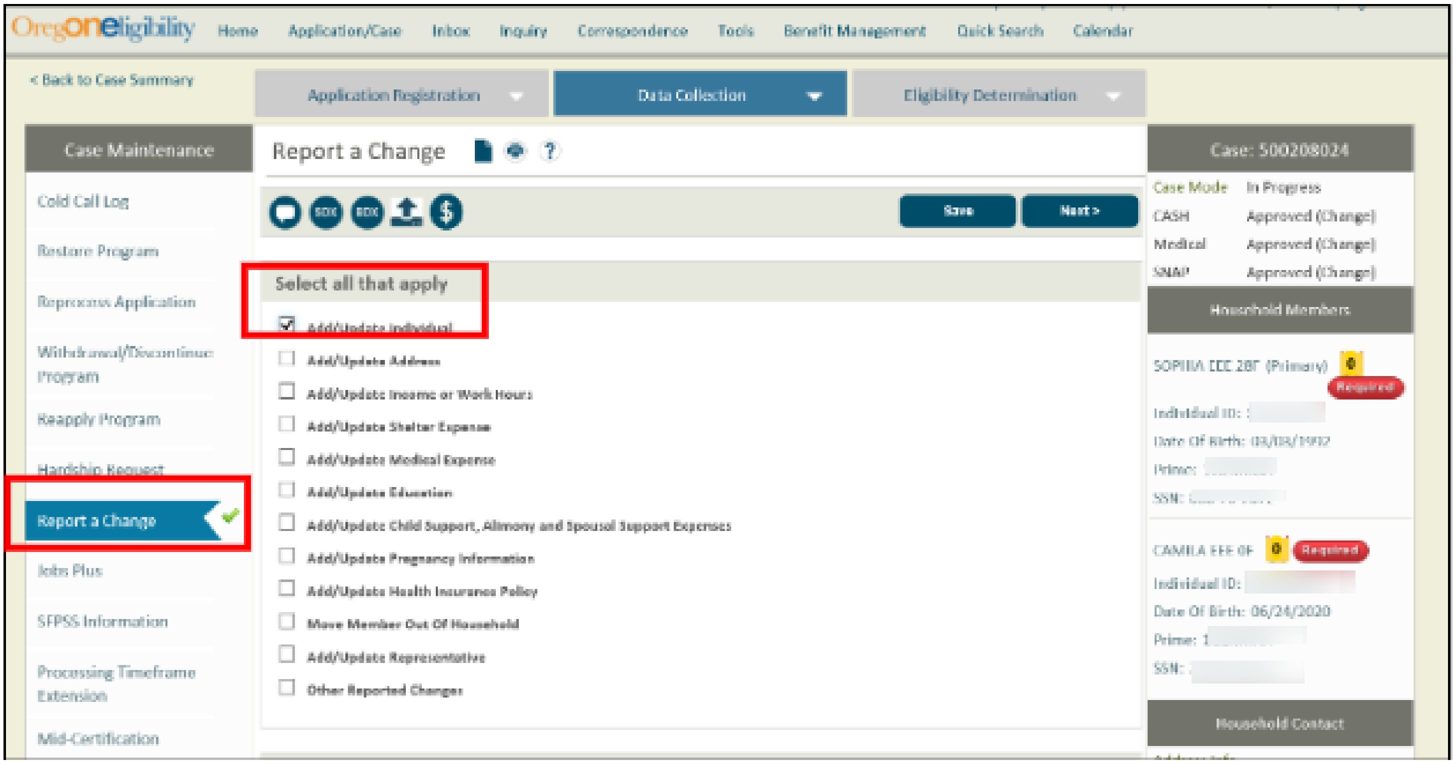
- As mentioned above, medical cases where the individual was in a nursing facility or community-based care, and the medical and/or services request is pending
- If the deceased individual's spouse is still living and files taxes as, 'Married, Filing Jointly'

Processing the Report of Death in ONE – No Other Household Members or Deceased is not Head of Household

Complete the following steps when a death is reported. If you are processing a Report of Death of Individual task, the same steps apply. You can also refer to the Eligibility Worker Tasks: H – V Worker Guide.

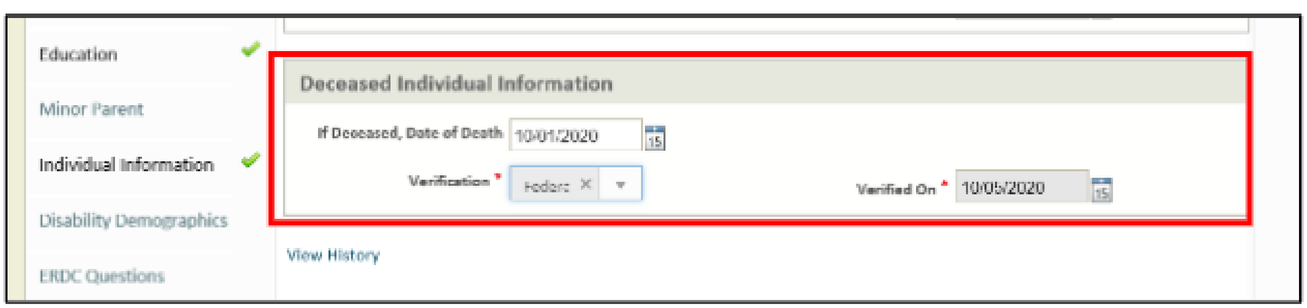
1. From Case Summary, select **Report a Change**
    - If processing the task, clicking **Start** will bring you to the **Individual Summary** screen. Click on the **case number hyperlink** to navigate to the **Case Summary** screen. Then click **Report a Change**.

2. Select **Add/Update Individual** and click **Next.**



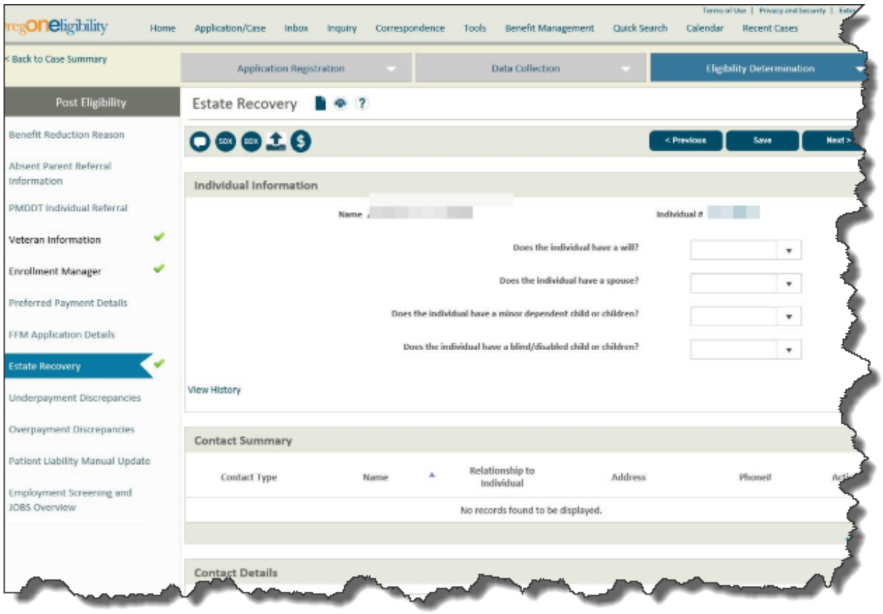
3. Navigate to the **Individual Information** screens in **Data Collection**.

4. Record the **Date of Death** for the individual in the **Deceased Individual Information** section.



5. **Run Eligibility** and if not already completed, complete the **Estate Recovery** screen when it populates during **Post Eligibility**

6. **Authorize Benefits**



REMEMBER

For cases in ONE, manual referrals are no longer needed as EAU will be notified via monthly reports

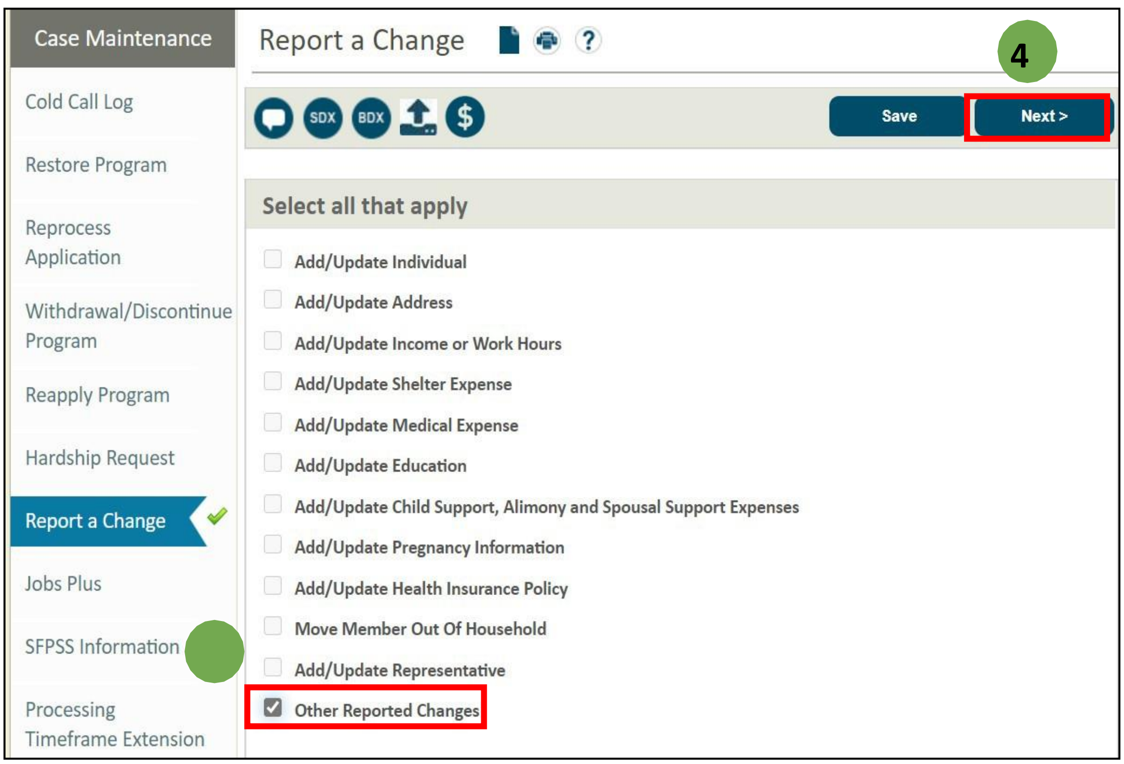
7. If processing the task, manually close the task by navigating to your **Homepage** and selecting **Mark as Complete** from **Inbox-Outstanding Tasks**.

Processing the Report of Death in ONE – Deceased is Head of Household With Other Case Members

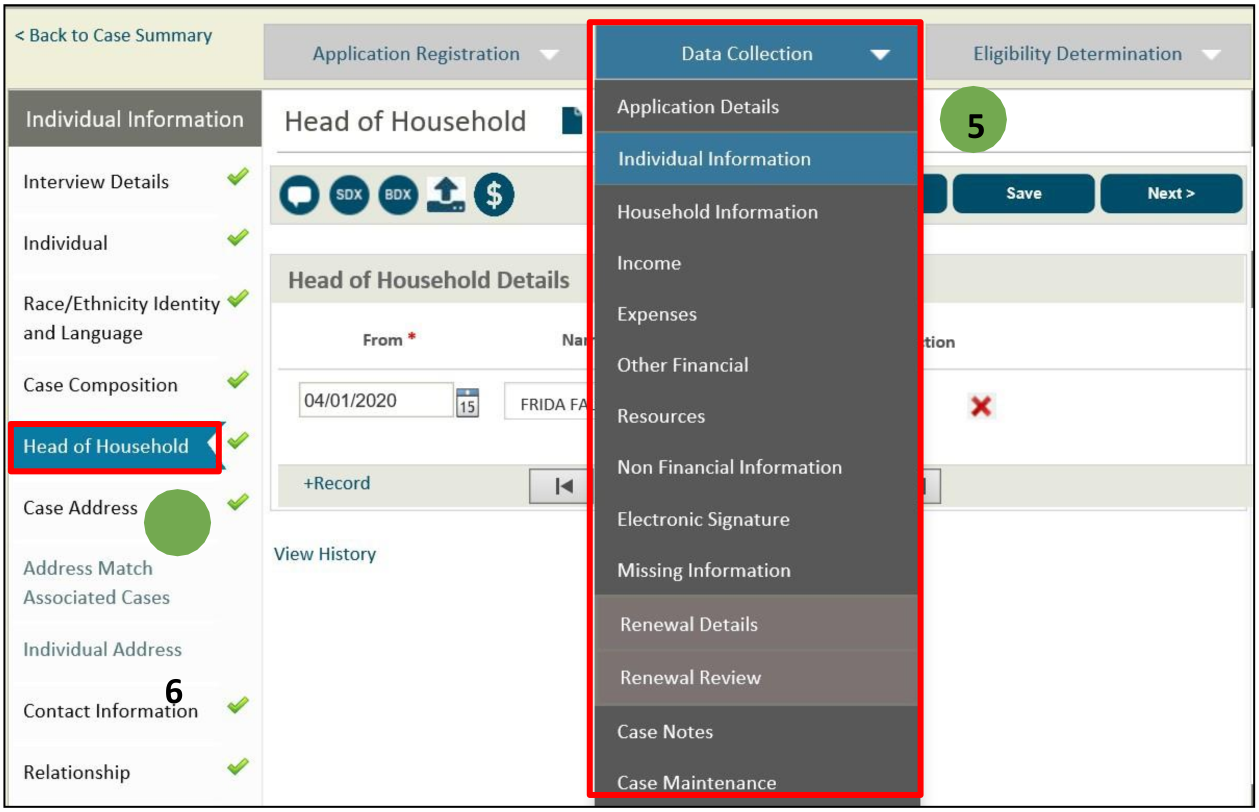
This process should be used when there are multiple members on a case and there is a reported change of the HOH being deceased:

1. Contact other household members on the case and designate a new Head of Household.
2. From the right navigation menu on the **Case Summary** screen, click **Report a Change**.
3. When the **Initiate Action Confirmation** pop-up screen displays, click **Start** to indicate you are accepting the change in case status and case mode.

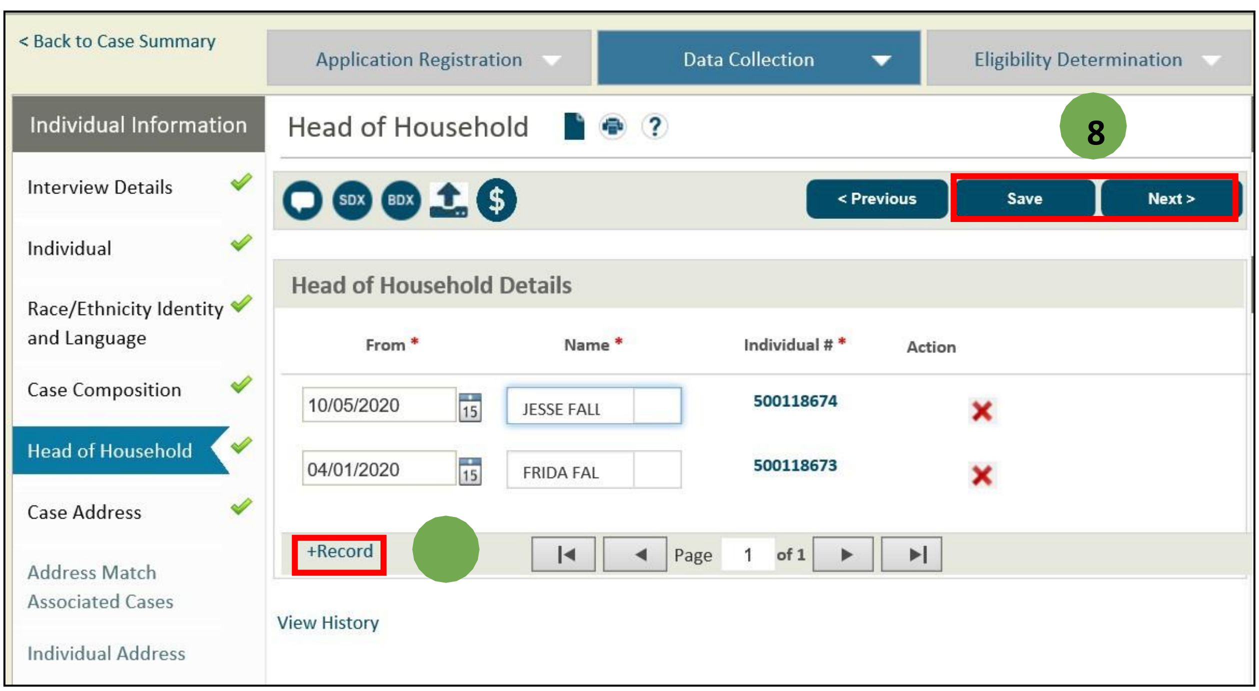
4. The **Report a Change** screen displays. Here, select **Other Reported Changes**.
5. Click **Next**.



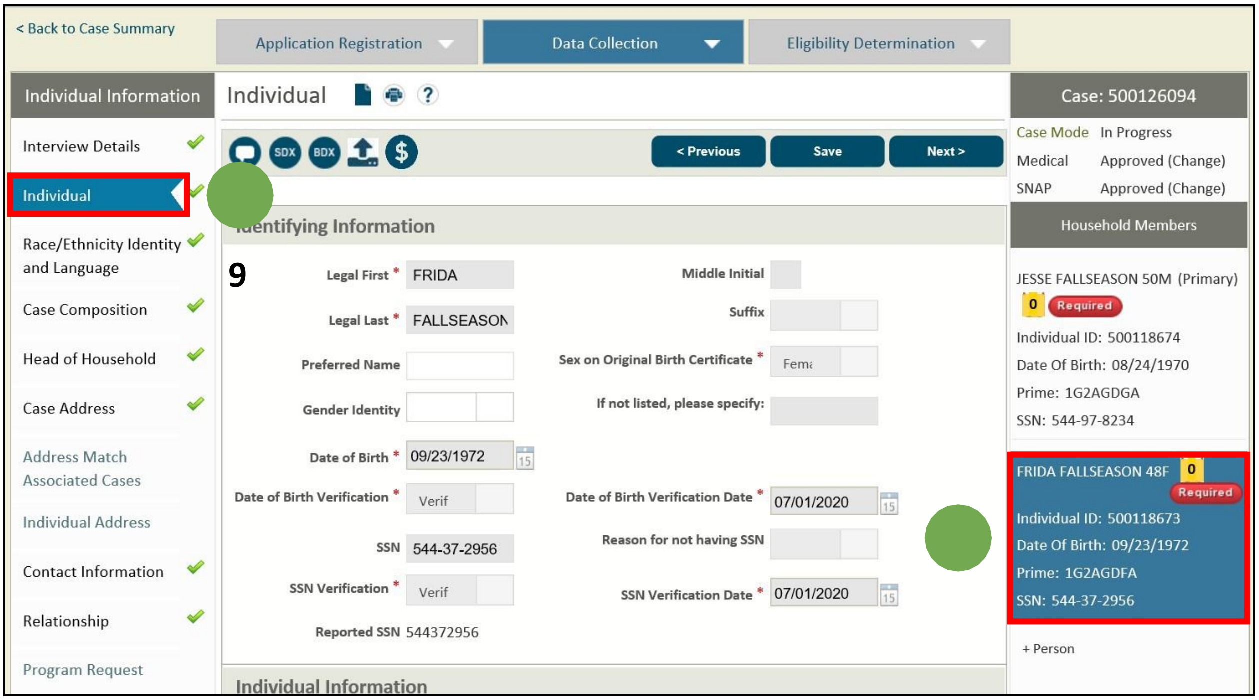
6. Navigate to **Individual Information** in Data Collection.
7. Select **Head of Household** from the left navigation panel.



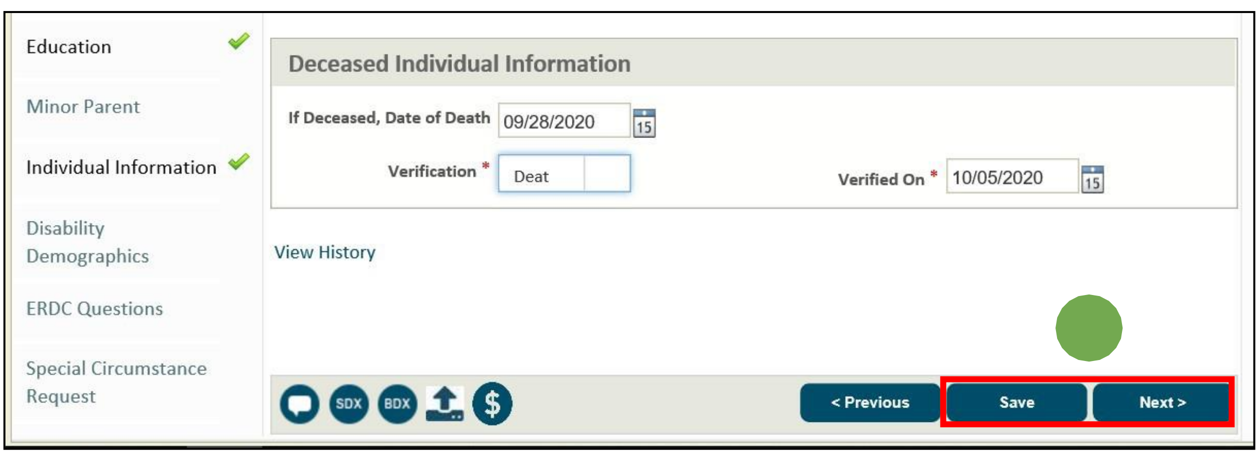
8. Add a new record to establish the new Head of Household. The previous record will become an archived record automatically.
9. Click **Next** or **Save**.



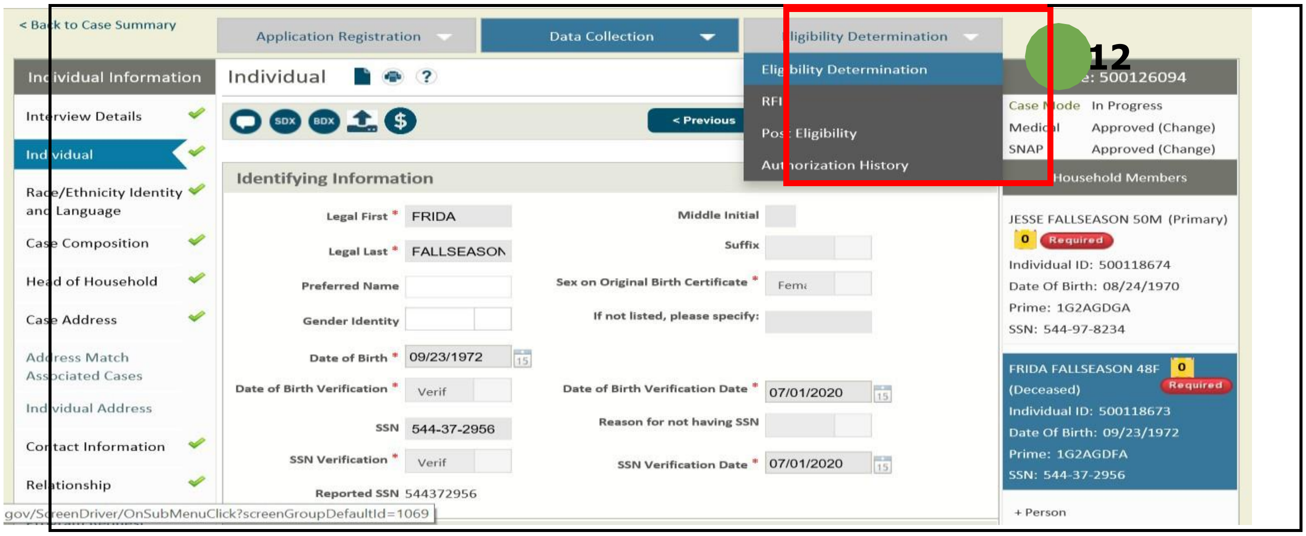
10. Navigate to **Individual Screen** from the left-hand navigation panel.
11. Select the household member from the right-hand navigation panel and update the date of death.



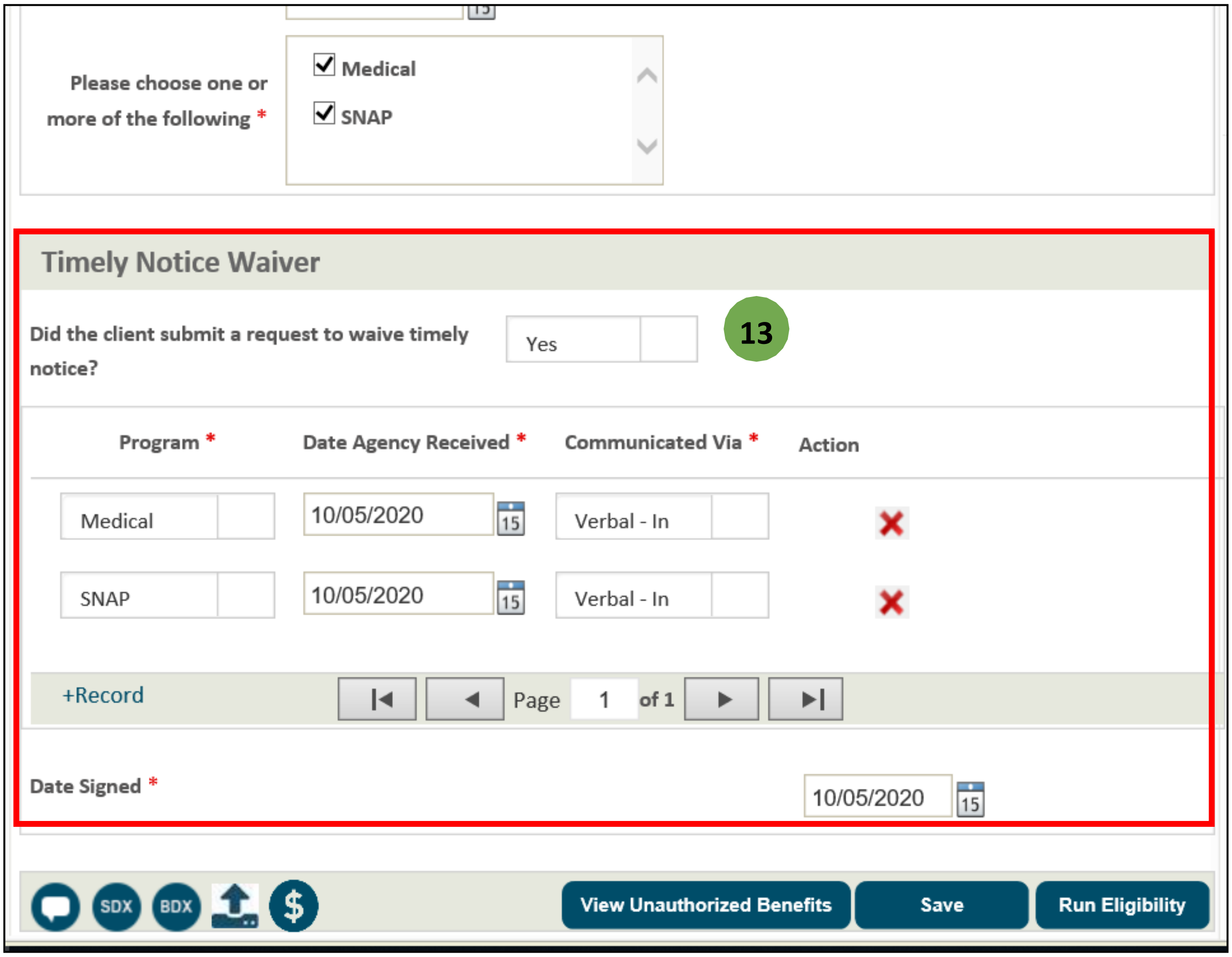
12. Click **Next** or **Save**.



13. Navigate to the **Eligibility Determination** screen.



14. Select **Yes** for the Timely Notice Waiver if applicable and add a separate record for each applicable program and then run eligibility, complete the post eligibility screens and authorize benefits.



Other tools for support:

[Add or Remove a Member, Change Head of Household QRG]
[Case Composition Screen QRG]
[Case Changes QRG]
[Phone Contact ETOP]
[COVID-19 Alternative Processes QRG]
[COVID-19 Response Worker Guide]
[Data Collection Navigation QRG]