

# Death of a Client

Last Updated: 03/23/2022

## Overview

This job aid describes the steps needed to address the death of a client on a case or multitude of cases in NC FAST. It is divided into two sections: what to do for a one-person household and what to do for a multi-person household.

### Notes:

- Some of the steps for managing the death of a client will be different depending on whether the deceased is the Head of Household/case head (HoH) or a Household Member (HHM). If the person being removed from the case is the HoH/case head, another household member should be appointed before the deceased person is removed from the case. Refer to the *Updating the Case Head on a Medical Assistance Product Delivery Case* job aid.
- Follow the instructions in the *Death of a Special Assistance Client* job aid when a SA beneficiary dies.
- Program Integrity workers will need to review the *PI - Deceased Debtor Reference Guide* when a debtor is deceased, and a caseworker has added the date of death on the debtor's Birth and Death Details evidence.

## Step-by-Step Instructions

### Person Page: Update Birth and Death Details Evidence

1. Navigate to the deceased individual's Person page. Consult the *Searching for Persons* job aid for guidance.
2. The Person page displays. Click the **Evidence** tab.
3. The Evidence page displays. Click the **List Actions Menu** associated with Birth and Death Details then select **Edit**.
4. The Edit Birth and Death Details pop-up appears.
  - a. Enter the beneficiary's date of death in the Date of Death text field.
  - b. Enter the source(s) that confirms the client's death in the Comments text field.
  - c. Click **Save**.

- d. A confirmation pop-up appears. Click **Yes** to confirm the Date of Death.

**Note:** The pop-up will close and the context panel for the client will refresh when **Yes** is clicked. The client's information will remain the same when Cancel is clicked.

5. The Evidence page displays, and the Context panel refreshes. *DECEASED* in red text now appears under the person's demographic data in the Context panel.
6. Click the **Care and Protection** tab to navigate to the Insurance Affordability (IA) or Income Support case(s) (ISC) which governs the deceased beneficiary's active Product Delivery Case(s) (PDC).
  - a. The Case page displays. Click the **Reference** number hyperlink associated with the active PDC(s).
  - b. The PDC displays. Click the IA or ISC **case reference number** hyperlink located in the Context panel.
  - c. The Insurance Affordability or Income Support case displays. Follow either the One Person Household or Multiple Person Household instructions below as applicable.

**Note:** Adding Date of Death to Birth and Death Details evidence on the Person page prompts NC FAST to:

- Marks the deceased beneficiary as *Primary Deceased* or *Member Deceased* in the Context panel on the IA/ISC.
- Reassess the PDC(s) associated with the deceased beneficiary.
- Puts all cases associated with the deceased beneficiary on *Automatic Hold*.
- This does not apply for SCCA cases, the SCCA casework will need notification to act upon the Change of Circumstance for the client.

## One Person Household

1. Starting on the ISC or IA Home page, click the **Evidence** tab then click the **Household** evidence or **Application Details** evidence.
2. The applicable page displays. Click the **Toggle** for the deceased person.
3. Click the **List Actions Menu** then select **Edit**.
4. Enter the date in the **End Date** field. Click the **End Reason** drop-down then select **Deceased**.
5. On the Evidence dashboard click the **Page Actions Menu** then select **Apply Changes**.

6. The Apply Changes pop-up displays. Click the applicable checkboxes then click **Save**.
7. Click the **Eligibility Checks** or **Eligibility** tab.
8. The Eligibility Checks page displays. Click the **Changed Decisions** tab.
9. The Determination History page displays:
  - a. Click the **toggle** associated with the PDC.

**Note:** The Determination Status is *Automatic Hold* for each Program listed.
  - b. The line item expands. Click the earliest ineligible **Coverage Period** date-range hyperlink.
10. The Program's Decision page displays on the Summary tab.
  - a. Examine the information to make certain it is accurate.
  - b. Click the **X** to close the Program's Decision page.
  - c. Complete steps 1-4 (b) for each of the other programs listed on the Determination History page.

**Note:** If the deceased client is on more than one IC, this process will need to be repeated for each program that is associated with that IC. (SCCA workers will need a notification that there is a deceased client if the client is receiving childcare benefits.)
11. The Determination History page displays. Click the **List Actions Menu** associated with benefit program then select **Accept w/Adequate**.
  - a. The Accept with Adequate Notice pop-up appears. Click **Yes**
  - b. The Create 8110 Wizard appears on Step 1 (*Create 8110*).
    - i. Click the **Reason** drop-down then select **Deceased**.
    - ii. Click the **Outcome** drop-down then select **Termination**.
    - iii. Click **Next**.
  - c. The 8110 Detail Wizard appears on Step 2 (*8110 Details*). Review the information for accuracy and when correct, click **Save**.

**Note:** This date range should begin on the first day of the month following the current month.
12. The Determination History page displays. Repeat step 4 for any other program listed. Click the **Home** tab to navigate to each of the PDCs associated with the ISC when finished.

13. The Income Support case displays on the Home page. In the Programs section, click the **case reference** number hyperlink associated with the benefit program(s) for the deceased client.
14. The PDC displays on the Home page. Click the **Tab Actions Menu** then select **Close Case**.
  - a. The Close Case pop-up appears.
    - i. Enter the **Closure Date**.
    - ii. Click the **Reason** drop-down then select **Deceased**.
    - iii. Enter **Comments**, as warranted.
    - iv. Click **Save**.
  - b. The benefit PDC re-displays. In the Context Panel, the status of the PDC updates to *Pending Closure*. Click the **X** to close the PDC tab.
15. The Income Support case displays on the Home page. Repeat steps 7-8 to close other programs listed. When all are closed, click the **Case Details** tab to manage the DSS-8110 form.

## Multiple-Person Household

If the Assistance Unit contains more than one person and the deceased client is head of household, the caseworker may need to designate a new head of household and manage Head of Household evidence on the Income Support case(s) associated with the Assistance Unit. This will depend on the policy for each program. Please refer to the Updating the Case Head on a Medical Assistance Product Delivery Case job aid for guidance.

1. Complete steps listed in the Person Page: Update Birth and Death Evidence section above.
2. Complete steps listed in the One Person Household.
3. Use table below to determine if the PDC needs to be closed.

Program	One Person Household	Multi-Person Household	
		HoH Deceased	HHM Deceased
FNS	Manage Evidence and Close Case	Close case. If possible, designate another HoH. End	Manage the evidence and apply changes. End date all

		date all evidence for the deceased client using the last day of the month as the end date and rekey another FNS application with a shorter certification period.	evidence for the deceased client using the last day of the month as the end date. The case will reassess with lower benefit amounts.
Cash Assistance	N/A	For Child Only Case- Close Case using proper reasons.  For a 2 Parent Case and HoH is deceased, change HoH before managing evidence.	Manage the evidence and apply changes. The case will reassess and may lower benefit amounts depending on the circumstance.
MAGI	Manage Evidence and Close Case	If possible, designate another HoH/case head, then manage evidence.	Manage the evidence and apply changes. The case will reassess and may lower benefit amounts.
Medical Assistance	Manage Evidence and Close Case	If possible, designate another HoH/case head, then manage evidence.	Manage the evidence and apply changes. The case will reassess and may lower benefit amounts.



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Program Integrity	Review the <i>PI - Deceased Debtor Reference Guide</i> when a debtor is deceased, and a caseworker has added the date of death on the debtor's Birth and Death Details evidence.
Special Assistance	Consult the <i>Death of a Special Assistance Client</i> job aid for detailed guidance.