

K Primary Informant - Effecting Changes



Effecting changes to the [primary informant\(g\)](#).

Policy

Once a case has been registered and a Primary Informant (PI) assigned in [AZTECS\(g\)](#), that [participant\(g\)](#) must remain the PI of the case.

NOTE When the PI moves with **some or all** of the other [budgetary unit\(g\)](#) participants, see **both** of the following:

- [Address – Effecting Changes](#)
- [Participants Living in the Household – Effecting Changes](#)

Death of the NA PI

When the death of the PI becomes known, **all** of the following apply:

- For a budgetary unit of two or more participants, complete **all** of the following:

The case is closed allowing for [Notice of Adverse Action\(g\)](#)

A notice is sent to the last known address informing the remaining participants they must submit an application.

NOTE **Any** of the following individuals may be established as an EBT Alternate Card Holder when the budgetary unit needs access to the remaining NA benefits after a case is closed due to death of the NA PI:

- An adult budgetary unit member
- A non-participant adult who has parental control of the remaining budgetary unit members. Identity of the adult having parental control must be established and verification of living arrangements when questionable

(See [EBT Alternate Card Holder](#))

- For a single participant budgetary unit, **all** of the following apply:

NA benefits are stopped the first month possible. A notice is not sent.

The Fidelity Information Services (FIS) deactivates the EBT card and sets an early expungement deactivation date.

When the deactivation date expires, any remaining benefits on the EBT card are purged and cannot be reactivated.

When NA benefits are closed in error FAA can only reactivate benefits within 62 calendar days or less of the closure.

Death of the CA PI

When the death of the PI becomes known, **all** of the following apply:

- An individual acting as a representative for, or on behalf of, the deceased CA PI may be named as an emergency Alternate Card Holder. (See [CA EBT Alternate Card Holder - Emergency Situations](#) for additional information)
- When no CA EBT Alternate Card Holder is available, the CA case is closed.

Procedures

Using the guidelines in the policy, redetermine eligibility and the current benefit level for the appropriate month. (For guidelines regarding the appropriate month, see [When to Effect Changes](#).)

For NA, when the death of the NA PI is reported and there are remaining participants in the budgetary unit, stop NA benefits allowing for NOAA.

When NA is closed and the budgetary unit needs access to the remaining NA benefits, an EBT Alternate Card Holder may be established for NA. (See [EBT Alternate Card Holder](#) for procedures on setting up the alternate card holder.)

NOTE When it is discovered that the NA case closed in error and it has been 62 calendar days or less since the date of closure, reactivate the EBT card. (See [Reopening Procedures](#))

For CA, when the death of the CA PI becomes known, complete **one** of the following:

- Name an individual acting as a representative for, or on behalf of, the deceased CA PI as an emergency Alternate Card Holder. (See [CA EBT Alternate Card Holder - Emergency Situations](#) for time frames and additional procedures)
- When no CA EBT Alternate Card Holder is available, stop CA benefits allowing for NOAA.

Document the case file.

AZTECS Keying Procedures

Death of the NA PI – Remaining Participants in the Budgetary Unit

Complete **all** of the following:

- On SEPA key **both** of the following:
 - DH in the INELIG RSN field
 - The date of death in the INELIG DATE field
- On FSED, key the PO Denial Closure Reason Code on FSED and stop NA benefits allowing for NOAA.
- On NORE select and send the PI No Longer In Home Deny/Close (F205) notice and delete any unneeded notices.

Death of the NA PI – Single Participant Budgetary Unit

Key **both** of the following on FSED the first month possible:

- DH in the DENIAL CLOSURE REASON field.
- The date the participant became ineligible in the INELIG DATE field. No notice is required.

Death of the CA PI

When a CA EBT Alternate Card Holder has been named, complete **all** of the following:

- When a new address is provided, key the address on ADDR
- Key the OU Participation Code in the PT field on SEPA next to the PI.
- Key the DH Ineligible Reason Code in the INELIG RSN field on SEPA.

When a CA EBT Alternate Card Holder is not named, complete **both** of the following:

- Key the DH Denial Closure Reason Code on AFED allowing for NOAA.
- On NORE send the Cash Assistance Deny-Close (A200) notice and delete any unneeded notices.

[Prior Policy](#)

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