

E Death of a Participant – Effecting Changes



This section includes information about what happens when the death of a participant is reported.

Policy

Notification of a participant's death may be reported by **any** of the following:

- Another participant in the budgetary unit
- Third-party source
- System Interface

When FAA is notified of a participant's death, verification is required before removing or stopping the deceased participant's benefits. **One** of the following applies:

- When FAA receives a report of death from a third-party source, it is considered [unclear information\(g\)](#). FAA must request verification of the death of the participant.

NOTE A report of death from the deceased participant crossmatch report provided by the Arizona Department of Health Services (ADHS) Office of Vital Records is considered verified upon receipt, no additional verification is needed. See [Crossmatch Reports](#) for more information.

- When the death is verified, the deceased participant is removed from the case. (For guidelines regarding the appropriate month, see [When to Effect Changes](#)). Allow for **one** of the following:

[Notice of Adverse Action\(g\)](#) is sent when the removal of the deceased participant causes a benefit decreased and there are remaining participants in the budgetary unit.

No notice is required when the deceased participant is the only participant or all participants in the budgetary unit are deceased.

Death of the Primary Informant (PI)

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

When the death of the NA PI becomes known, **one** of the following applies:

- For a budgetary unit of two or more participants, FAA sends a notice to the last known address. The notice informs the remaining participants they must submit an application to continue receiving benefits.

NOTE **Any** of the following individuals may be established as an Electronic Benefit Transfer (EBT) Alternate Cardholder when the budgetary unit needs access to the remaining NA benefits after a case is closed:

- An adult budgetary unit member
- A non-participant adult who has parental control of the remaining budgetary unit members. The identity of the adult having parental control is required to be established. Living arrangements are not verified unless questionable

(See [Electronic Benefit Transfer \(EBT\) QUEST Card](#))

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

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.

When the death of the CA 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 Cardholder. (See [CA EBT Alternate Cardholder - Emergency Situations](#) for additional information)
- When no CA EBT Alternate Cardholder is available, the CA case is closed.

Procedures

When the death of a participant is verified, remove the deceased participant from the case. Complete **one** of the following:

- Allow for Notice of Adverse Action (NOAA)
- Stop the benefits the first month possible. No notice is required

Death of the Primary Informant (PI)

For NA, complete **all** of the following when the death of the NA PI becomes known and there are other participants in the budgetary unit:

- Remove the PI the first month possible
- Stop the NA benefits allowing for NOAA
- Send the appropriate notice

When the NA is closed and the budgetary unit needs access to the remaining NA benefits, complete **one** of the following:

- Establish an Electronic Benefit Transfer (EBT) Alternate Cardholder.
- Reactivate the EBT card when it is discovered that the NA closed in error, and it has been 62 calendar days or less since the date of closure.

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 Cardholder. (See [CA EBT Alternate Cardholder - Emergency Situations](#) for time frames and additional procedures)
- When no CA EBT Alternate Cardholder is available, stop CA benefits allowing for NOAA.

Document the case file.

To remove a participant in the case, see **any** of the following based on the program and the case status for the specific procedures:

- [Removing a Participant from a Pending NA Application](#)
- [Removing a Participant from a Pending NA Renewal Application](#)
- [Removing a Participant from an Active NA Case](#)
- [Removing a Participant from a Pending CA application](#)
- [Removing a Participant from an Active CA Case](#)

NOTE The CA procedures also apply when processing a CA renewal application.

Verification

System interface and the [case file\(g\)](#) must be reviewed before verification is requested. No additional verification is needed when AZTECS interface or HEAplus hubs have identified the participant has already verified the eligibility factor.

The participant has the primary responsibility for providing verification. (See [Participant Responsibilities – Providing Verification](#) for additional policy.)

Documents used for verification include, but are not limited to, **any** of the following:

- A letter from an out-of-state vital statistics agency
- Death Certificate
- Birth certificate
- Hospital records
- In Memoriam card
- Indian census records
- Institutional records

- Insurance company records
- Minister statement
- Newspaper obituaries
- Policy records
- Signed funeral director's statement
- VA or military service records

AZTECS Keying Procedures

Death of a Budgetary Unit Member

Complete **all** of the following to remove a deceased participant from an active case:

- On the SEPA screen, key OU in the participant's PT field and DH in the INELIG REASON field for the correct month for all programs
- On NORE, select and send the appropriate notice.

When removing a deceased participant results in ineligibility complete all of the following:

- On the AFED or FSED screen, key the date of denial or closure in the INELIG DATE field as applicable for the appropriate program. For more information about program ineligible dates, see the links below:

[NA Ineligibility Date](#)

[CA Ineligibility Date](#)

- On NORE, select and send the appropriate notice.

Death of the NA PI

When the NA PI has died and there are remaining participants in the budgetary unit, complete **all** of the following:

- On FSED, key the PO Denial Closure Reason Code and stop NA benefits allowing for Notice of Adverse Action (NOAA).
- On NORE, select and send the PI No Longer In Home Deny/Close (F205) notice and delete any unneeded notices.

When the NA PI is the only participant in the budgetary unit, key **all** of the following on FSED the first month possible:

- DH in the DENIAL CLOSURE REASON field.
- The date of death in the INELIG DATE field. No notice is required.

Death of the CA PI

When a CA EBT Alternate Cardholder 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 Cardholder is not named, complete **all** 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.

Legal Authorities

7 CFR 273.14

7 CFR 272.14 (c)(1)

7 CFR 273.13

7 CFR 273.18

[Prior Policy](#)

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