



***Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance***


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**Operations Memo 2014-54
August 21, 2014**

To: Department of Transitional Assistance Staff

From:  **Anne O'Sullivan, Acting Assistant Commissioner for Policy, Program and External Relations**

Re: TAFDC, EAEDC and SSP: Centralization of the Funeral and Final Disposition Benefit

Overview

The Department of Transitional Assistance (DTA) is the state agency responsible for paying funeral and final disposition expenses for:

- any person who was without sufficient resources or financially responsible relatives to pay for funeral and final disposition expenses; or
- any person whose identity is unknown and found deceased.

A maximum of \$1,100.00 may be paid, provided that the total expense of the funeral and final disposition does not exceed \$3,500.00. If payment is made, the Department has preferred claims for reimbursement against the decedent's estate and resources, if any exist.

Purpose of Memo

Effective August 25, 2014, the Department will centralize all applications for the funeral and final disposition benefit in the Central Burial Unit (CBU) established as part of the Central Eligibility Processing (CEP) unit.

Applications taken at the TAO *through the close of business* August 22, 2014 must be processed by the case manager.

Purpose of Memo (continued)

The purpose of this Operations Memo is to:

- inform DTA staff about the centralization of the funeral and final disposition benefit in the CBU;
 - issue procedures for facilitating the centralization of this benefit;
 - reissue procedures for funeral and final disposition applications submitted on behalf of an individual who at the time of death was an active or pending TAFDC or EAEDC client; and
 - reissue procedures for funeral and final disposition applications submitted on behalf of an individual who at the time of death was an SSI recipient, an SSP client, or a non-client.
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Obsolete Memo

Effective August 25, 2014, Operations Memo 2012-35: *TAFDC, EAEDC and SSP – Funeral and Final Disposition Payment Changes* is now obsolete.

Central Burial Unit Responsibility

Staff in the CBU will be responsible to take all applications for the funeral and final disposition benefit and process the requests following procedures detailed later in this memo.

An application can be initiated by a telephone call to the CBU from the next of kin of the deceased person or from the Funeral Director. CBU staff will obtain information about the deceased person required on the *Application for Payment of Funeral and Final Disposition* (F&FD-1) form (Attachment A) and send the F&FD-1 form to the applicant or Funeral Director. The preference for cremation should be noted on the F&FD-1 form.

The applicant or Funeral Director will be instructed to return the completed form to the DTA Electronic Document Management Center (EDMC) post office box in Taunton, MA identified on the back of the form. The back of the F&FD-1 form has been updated with instructions to the applicant or Funeral Director to include the CBU/CEP name on each page of the documents submitted with the application.

Note: Any documents mailed to the CBU from an applicant or from the Funeral Director should be prepared and routed to the EDMC following procedures in Operations Memo 2014-33A. The cover sheets on these documents should identify the CBU.

**Central Burial
Unit Responsi-
bility
(continued)**

*Active and
Pending TAFDC,
and EAEDC
Clients*

A separate application for payment of funeral and final disposition expenses does not need to be completed on behalf of an individual who at the time of death was:

- an active TAFDC or EAEDC client; or
- a TAFDC or EAEDC applicant open in a pending status.

When a request is made to the CBU for these deceased clients, CBU staff will process the request and take action to close either the deceased client or the case(s) on BEACON, whichever is appropriate. CBU staff will email the appropriate TAO case manager about the funeral and final disposition benefit request and make a notation in the Narrative tab.

Note: The funeral and final disposition benefit is authorized through the issuance of a Special Services Payment System (SSPS) voucher. Procedures to fill out the SSPS voucher can be found in Volume 3 of the SSPS User's Guide, Chapter III: *SSPS Invoice for Special Services*, to which CBU staff have access.

When the decedent is in receipt of TAFDC or EAEDC, there is no need to wait for the SSPS voucher to be processed or the benefit to be paid to take the appropriate closing action.

**Case Manager
Responsibility:**
Pending Requests

Applications taken at the TAO *through the close of business* August 22, 2014 must be completed by the case manager following procedures outlined in Operations Memo 2012-35: *TAFDC, EAEDC and SSP – Funeral and Final Disposition Payment Changes*.

New Requests

Thereafter, when a request for the funeral and final disposition benefit is made to a TAO for a client in receipt of TAFDC or EAEDC, the case manager must refer the applicant or Funeral Director to the CBU by giving him/her the F&FD-1 form and the CBU contact information. A notation should be made in the Narrative regarding the request for the funeral and final disposition benefit and the referral to the CBU.

The case manager must take action to close either the deceased client or the case(s) on BEACON, whichever is appropriate. There is no need to wait for the CBU to process an SSPS voucher or the benefit to be paid to take the appropriate closing action.

If a request for the funeral and final disposition benefit is made to a TAO and the deceased is **not** in receipt of TAFDC or EAEDC, TAO staff must refer the applicant or Funeral Director to the CBU by giving him/her the CBU contact information.

CBU Contact Information

Contact information for CBU staff will be sent electronically with this Operations Memo under separate cover and will appear on DTA Online under the Field Operations Organization Chart/Phone Numbers and Faxes.

Applications for SSI Recipients, SSP Clients and Non-Clients

The F&FD-1 form must be used to collect the necessary information to determine eligibility for payment of the funeral and final disposition benefit for deceased individuals who were **not** active or pending TAFDC or EAEDC clients at the time of death, i.e. SSI, State Supplement Program (SSP) clients and non-clients. The preference for cremation should be noted on the F&FD-1 form.

The F&FD-1 form must be submitted to the CBU. It may be submitted:

- on behalf of any deceased person who was **not** an active or pending TAFDC or EAEDC client at the time of death;
 - by a relative, friend, medical examiner or other person who is able to complete the application process and provide any necessary verifications; or
 - by a funeral director, if no relative, friend or medical examiner is able to complete it.
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Verification of Funeral and Final Disposition Expenses

In all instances of requests for payment of the funeral and final disposition benefit, the Funeral Director must:

- submit an signed itemized bill detailing the total expenses of the funeral and final disposition; and
Note: The total cost of the final disposition expenses **cannot** exceed \$3,500.
- report any money paid or to be paid by sources other than the Department.
Note: This can be noted on the F&FD-1 form if the Funeral Director is filling out the form.

The Department will pay the balance of the funeral and final disposition cost up to \$1,100, if eligible.

Assets

Assets include, but are not limited to, savings and other bank accounts, life insurance, RSDI, Veterans' Administration death benefits, and personal needs accounts of nursing home or other long-term-care decedents. In all instances, death benefits and other resources must be explored before funeral and final disposition expenses are authorized.

Important: Veterans' Administration Death benefits for funeral and final disposition will not be paid, once the Department authorizes the payment of the funeral and final disposition expense; therefore, *it is important that this benefit be explored before approving the payment.*

Any assets available from the decedent or a financially responsible relative must be deducted from the maximum payment (\$1,100). The Department then pays the balance, if any, up to \$1,100.

Example #1: Mr. Richards was a resident in a long-term-care facility. His only asset at the time of his death was a personal needs account of \$600. There is no financially responsible relative. Deduct \$600 from the maximum allowable funeral and final disposition payment of \$1,100 and authorize a funeral and final disposition a payment of \$500.

Example #2: A TAFDC case consisted of Mr. and Mrs. Green and two children. When Mr. Green died, Mrs. Green had a bank account with \$1,150. Mrs. Green is a financially responsible relative. Since her assets exceed the \$1,100 maximum funeral and final disposition payment, Mr. Green is not eligible to have any of his funeral and final disposition expenses paid by the Department. The request for payment of funeral and final disposition expenses must be denied.

SSI Recipients and SSP Clients

Once the F&FD-1 form is completed for an SSI recipient or an SSP client and that person is determined eligible, **there is no need to enter them onto BEACON.** The SSPS was modified to validate the entry of SSPS benefits for SSI recipients against SSI information available as part of the SDX update process.

**Establishing a
Non-Client
Decedent on
BEACON**

Once the F&FD-1 form is completed and that person is determined eligible, he or she must be established as a pending case on BEACON (unless the decedent was in receipt of SSI or was an SSP client) before the funeral and final disposition payment may be authorized.

Note: Information is exchanged between BEACON and FMCS during the evening of the day the information is data-entered onto BEACON. No payments should be submitted until that information has been exchanged.

A decedent, who was not an active or a pending TAFDC, EAEDC or SSP client at the time of death *nor on FMCS as a former client who has since closed*, but who is approved for payment of funeral and final disposition expenses must be processed as a pending EAEDC case.

CBU staff will enter the non-client decedent's data on BEACON by completing:

- the Request for Assistance (RFA);

Note: Although the F&FD-1 form is to be mailed to the CBU for processing, the funeral and final disposition application must be data entered on BEACON as an EAEDC application. CBU staff must enter the decedent as a walk-in applicant and establish a physical case record for the decedent in the CBU. The signature on the F&FD-1 form is acceptable as a signature on the RA-1.

- the Household Composition; and
- the AU Composition sections.

CBU staff must manually calculate whether the decedent is financially eligible for the funeral and final disposition payment and note this calculation on the Narrative tab. Copies of any paperwork showing the calculation and the amount of benefits must be filed in the case record.

**Approving or
Denying Funeral
and Final
Disposition
Expenses**

CBU staff will complete and send an NFL-9, approving or denying payment for funeral and final disposition expenses, to the person who made the request on behalf of the decedent (this may also include the Funeral Director).

Closing the Decedent and/or the Case

After the SSPS invoice for payment of the funeral and final disposition expenses has been established for a TAFDC or EAEDC decedent (including non-clients opened as a pending EAEDC case), CBU staff must close either the deceased client or the case on BEACON, as appropriate.

Note: There is no need to wait for the SSPS Invoice to be paid to close the case. As long as the case is known to FMCS for one day after the case is established on BEACON, the case can be closed on BEACON.

- If the decedent was opened as a pending EAEDC case for the express purpose of paying funeral and final disposition expenses, CBU staff must deny the case by accessing the AU Composition Results page and choosing **Admin-TAO** from the Reason category dropdown box and **Administrative Closure** from the Reason dropdown box. Using this closing reason will prevent a system-generated letter from being sent. An entry must be made on the Narrative tab explaining the denial.
- If the decedent was an active TAFDC *dependent*, and there are other active TAFDC household members who remain eligible, CBU staff will close *only* the TAFDC dependent by accessing the AU Composition Results page and choosing Program Rules from the Reason category dropdown box and Death from the Reason dropdown box. CBU staff must email the appropriate case manager and make a notation on the Narrative tab.
- If the decedent was an active TAFDC grantee or EAEDC client, or had a pending TAFDC or EAEDC application, CBU staff **must close or deny the case** by accessing the AU Composition Results page and choosing Program Rules from the Reason category dropdown box and Death from the Reason dropdown box. CBU staff must email the appropriate case manager and make a notation on the Narrative tab.

The estate of a decedent/client will receive a BEACON notice explaining the status of the benefit.

Important: Because the original case will be closed, if the decedent's children in a single parent case are to remain on TAFDC and/or SNAP, the adult now caring for them must complete a new application at the TAO.

Questions

If you have any questions, please have your Hotline designee call the Policy Hotline

Is there any pre-paid burial agreement? yes no If yes, amount \$ _____
Is there a Veteran's death benefit? yes no If yes, amount \$ _____
Is there a Social Security death benefit? yes no If yes, amount \$ _____
Is there any other death benefit? yes no If yes, amount \$ _____
If death benefit, what type of benefit _____

I understand that this application is subject to review, and that I have enclosed a list of all funeral and final disposition services provided, receipts and other verifications of all expenses.

I understand that the Department of Transitional Assistance will investigate all facts relating to eligibility for payment of funeral and burial expenses. To the extent that I am legally authorized to do so, I further consent to assign to the Department of Transitional Assistance any benefits from insurance or third party, as required by state law, if death was a result of an accident. The Department has preferred claims against the decedent's estate and any existing resources the decedent may have possessed.

I certify, under penalty of perjury, that the information I have given is correct, true, and complete to the best of my knowledge.

Printed Name / Date

Signature

You must return this form to: DTA, P.O. Box 4406, Taunton, MA 02780-0420 or fax to: (617) 887-8765. Please include the deceased's name, the DTA Central Burial Unit/Central Eligibility Processing unit and the last 4 digits of the deceased's Social Security Number on each page of the documents you submit.