



Monterey County Behavioral Health Policy and Procedure

Policy Number	437
Policy Title	Adult Services/Case Management Representative Payee Services Deceased Client Accounts
References	Monterey County Board Of Supervisors
Form	None
Effective	October 1, 1991

Policy

As the appointed Representative Payee of Monterey County Department of Health, Behavioral Health Division, Adult Services Program, the Representative Payee Services is responsible for notifying in writing the Office of the Public Guardian and all appropriate offices, agencies, departments, and institutions when a designated mental health client dies. This is done for the purpose of freezing all funds in the deceased's account.

Procedure

A. Initial Representative Payee Action

The Monterey County Department of Health, Behavioral Health Division, Adult Services Program, and Representative Payee Services will take immediate action to ensure that the sources of the client's income are notified of the client's death.

1. Upon learning of the client's death, the Representative Payee shall immediately complete a notification of the date, the official time and the location of death on Form RPS-54 and send the notice to the Adult Services Program Unit Supervisor or designee.

2. The Unit Supervisor shall co-sign and give Form RPS-54 to the Adult Services Program Patient Services Representative for immediate transmission of the document to the Office of the Public Guardian Principal Clerk.

3. The Representative Payee shall collect, review and process all MediCal claims through the Adult Services Program Patient Services Representative to the Principal Clerk of the Office of the Public Guardian.

4. Upon receipt of notice from the Representative Payee Services as to the deceased client's name and the date, time and location of death, as well as notice of MediCal claims, the Office of the Public Guardian will file all MediCal claims against the estate, and then freeze the deceased client's funds (no deposits or disbursements) and establish a computer edit for stop payment for a 120 day period to await receipt of final bills, claims and notices of over payments and/or underpayments of both income and claims.

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a. When a person who receives Social Security dies, no check is payable for the month of death. Any check received for the month of death or later must be returned.

b. A SSI check is payable for the month of death. SSI checks which are paid after the month of death must be returned to Social Security.

5. The Representative Payee shall collect, review and process all final bills, claims, and notices of over payments and underpayments through the Adult Services Program Patient Services Representative to the Principal Clerk of the Office of the Public Guardian.

6. At the completion of the 120 day period of freeze on the account, the Representative Payee and the Office of the Public Guardian will consult with the Social Security Administration liaison about the final settling of the estate.

a. All overpayments will be returned to the Social Security Administration.

b. After payment of expenses incurred by the client, the remaining conserved funds will be returned to the Social Security Administration for distribution to the heirs of the estate.

B. Other Actions

1. The Representative Payee Services and the Office of the Public Guardian will maintain a working file on each deceased client for six months after the death to properly dispose of the client's estate. At the end of six months, the Representative Payee Services will request the case be closed.

C. Funeral Arrangements

1. Funeral arrangements are generally the responsibility of the deceased's relatives as specified by law. No last expenses or other burial expenses are to be paid, except those covered by prepaid burial policies and/or burial expenses agreed upon by the Payee and the relatives, until instructions are received from the Representative Payee. If questions exist regarding removal of last remains, the Representative Payee shall contact the Coroner in the County where the death occurred.