

**Purpose:** This guide provides instructions for staff on what actions to take in OR PTC DCI after a consumer passes away to ensure their account is properly closed.

**Outcome:** Staff have properly ended authorizations and communicated to the PTC Support Team that the consumer has passed.

The Case Manager or local office person receives notification that the consumer passed away.

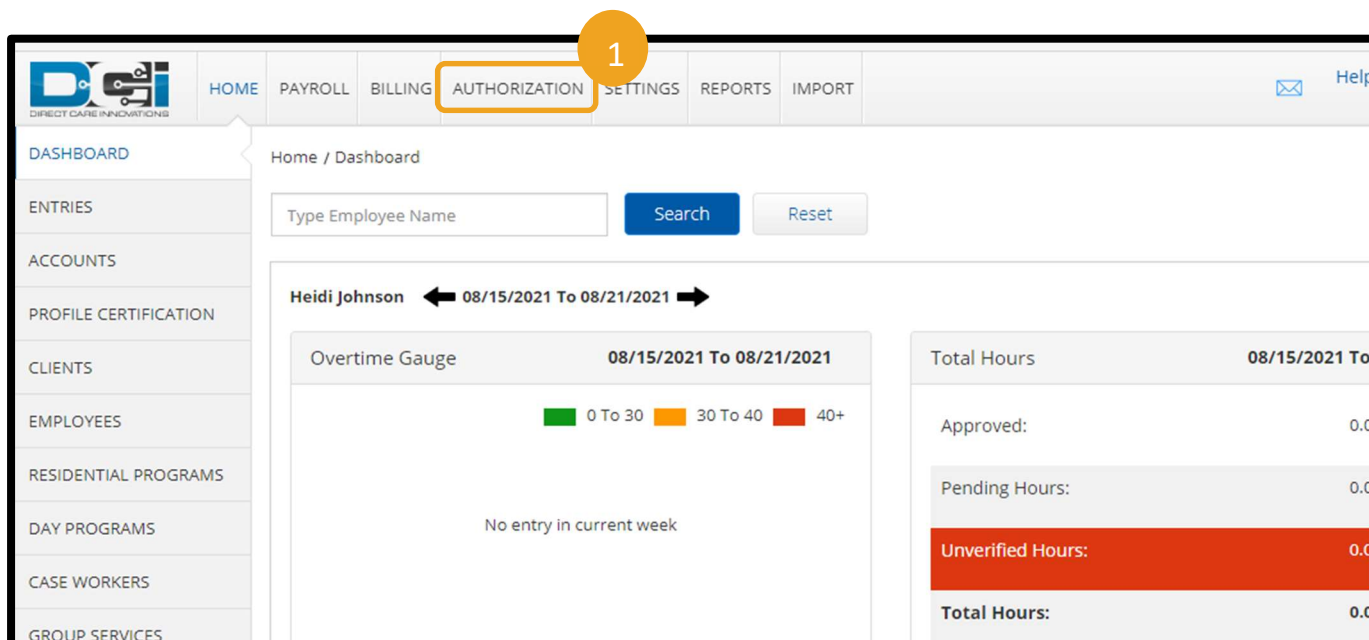
Local office staff need to follow business process [4.3.0 Time Entry](#) for the current pay period.

The Case Manager will notify Eligibility of the consumer's passing and completes 546 to request voiding of outstanding vouchers. This full process is covered in [3.3.0 Consumer Passes Away](#).

Voucher Specialist will void the voucher(s) in DHR, end ONGO, and reject the authorization(s)\* in OR PTC DCI. Then notify the PTC Support Team that the consumer passed away by emailing [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov). The PTC Support Team will update the funding account(s) and service account(s) and change the Client Profile to deceased and inactive.

The steps listed below are only the actions that need to be taken in OR PTC DCI. Please follow the [Case Management Death Checklist](#) to ensure all other appropriate actions are taken.

1. Click the Authorization tab.



# Staff – Consumer Passes Away



2. Search for the consumer.
3. Click on the consumer's authorization for the pay period during which they passed.

Authorization / Authorizations

### Authorizations

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Entry Id

Humpty Dumpty Type Service Code Initial Balance

Type Cost Center Select Status Type Authorization ID Reference

Reset Search

Export

Showing 1 out of 1 record

Id	Start Date	End Date	Client	Service Code	Funding Type	Bill Rate	Cost Center	Remaining Balance	Holds	Authorization Reference
331	Aug 01, 2021	Sep 17, 2021	Humpty Dumpty	Hourly ADL/IAD L-1	Units	0.00	0511-EU	69.00	0.00	123456

4. Click Actions.
5. Click Edit Authorization.

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### Authorization Detail - Humpty Dumpty/ Hourly/ 331

Authorization Details

Start Date: Aug 01, 2021  
End Date: Sep 17, 2021  
Expiration Date: Sep 22, 2021  
Initial Balance: 80.00  
Remaining Balance: 69.00  
Pre Authorizations: 0.00  
Holds:  
Monthly Max: 80.00

Account Details/ Service Account

Account Id: [1021](#)  
Account Type: Hourly  
Client: [Humpty Dumpty](#)  
Service Code: [Hourly ADL/IAD L-1](#)  
Portal Signoff: TRUE  
Funding Type: Units  
Funding Source: [APD](#)  
Cost Center: [St Helens APD-EU](#)

Actions

- New Note
- New Attachment
- Renew Authorization
- Rate Change
- Reject Authorization
- Edit Authorization**
- Edit Custom Field Values

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6. Change the end date to the consumer's date of death.
7. Click Save. An alert will show "Are you sure you want to Update Authorization," Click Yes.

Repeat steps 1-7 for each authorization, both hourly and mileage, for the pay period during which the consumer passed.

For all future authorizations, as in after the date of death, reject the authorization(s).

8. Search for the consumer's future authorizations (shown in steps 1-3 above).
9. For each future authorization, click Actions.
10. For each future authorization, click Reject Authorization. Then click Yes on the pop up.

Repeat steps 8-10 for all future authorizations.

11. Email [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov) to notify the PTC Support Team that the consumer has passed away and their account must be deactivated. Please specify in the email that the consumer has passed away, the consumer's prime number, the consumer's DOD, and if the provider's account should remain active or not (i.e., do they have other consumers).