

QRG - Consumer Passes Away



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.

Staff - Consumer Passes Away QRG.pdf

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. 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.
2. Search for the consumer.
3. Click on the consumer's authorization for the pay period during which they passed.
4. Click Actions.
5. Click Edit Authorization.
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 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).

Related articles

- [Business Process - Provider Switches During Pay Period Permanently](#)
- [Guide - OR PTC User Settings Guide](#)
- [Staff Learning Materials Catalog](#)
- [Guide - Time Entry Management](#)
- [Online Learning - Recovering a Forgotten Password](#)