



Department of Human Resources  
311 West Saratoga Street  
Baltimore MD 21201

Family Investment Administration  
**ACTION TRANSMITTAL**

Control Number: 08-22

Effective Date: Immediately

Issuance Date: January 16, 2008

**TO: DIRECTORS, LOCAL DEPARTMENTS OF SOCIAL SERVICES  
DEPUTY/ASSISTANT DIRECTORS FOR FAMILY INVESTMENT  
FAMILY INVESTMENT SUPERVISORS AND ELIGIBILITY STAFF**

**FROM: KEVIN M. MCGUIRE, EXECUTIVE DIRECTOR**

**RE: CHANGE IN FUNERAL EXPENSE AMOUNT FOR BURIAL  
ASSISTANCE**

**PROGRAM AFFECTED: BURIAL ASSISTANCE**

**ORIGINATING OFFICE: OFFICE OF PROGRAMS**

**SUMMARY:**

This action transmittal provides new policy about an increase in the maximum allowable expense of a funeral. In the past the cost of the funeral could not exceed \$1500. This amount has increased to **\$2500**. The burial assistance amount has not changed and is \$650.

**NEW POLICY AND POLICY REVIEW:**

1. Burial Assistance is the state funded assistance program which subsidizes funeral costs for a deceased customer who is:
  - ▶ A child receiving foster care assistance through the Social Services Administration at DHR.
  - ▶ A public assistance recipient, even if the grant was suspended but not cancelled. Public assistance means a cash grant and includes:
    - ❖ Public Assistance to Adults (PAA)
    - ❖ Mandatory State Supplement (MSS)
    - ❖ Temporary Cash Assistance (TCA)
    - ❖ Temporary Disability Assistance Program (TDAP)
    - ❖ Supplemental Security Income (SSI)
  - ▶ A recipient of Medical Assistance in a long term care facility at the time of death who previously received SSI

- ▶ A newborn child who is not part of the assistance unit if:
    - ❖ The child's mother receives TCA, and
    - ❖ The child died not more than 60 days after its date of birth or the date of the mother's release from the hospital in which the birth occurred, whichever is later
  - ▶ An individual (after filing an application) who is considered eligible for Temporary Disability Assistance Program (TDAP) even though he/she has not actually received assistance
  - ▶ The LDSS may provide a Burial Assistance grant for the preparation and transportation of the body of a deceased migrant worker to the migrant's place of origin.
2. The funeral services vendor must provide the applicant with three choices of funeral arrangements:
    - ▶ The cost of one choice may not exceed \$650.
    - ▶ One may not exceed **\$2500**
    - ▶ One choice must be between \$650 and **\$2500**
  3. The maximum grant which a customer can receive towards funeral expenses **is still \$650**
    - ▶ The service provider may request payment from the applicant in an amount not to exceed the total funeral expenses or **\$2500** minus the burial assistance.
    - ▶ The burial assistance amount is \$650 or the difference between the funeral expenses, not to exceed, **\$2500**, and the available resources of the deceased person, whichever is less.
  4. The burial assistance may not be used to reimburse the applicant or the vendor for paid funeral expenses.

When considering a customer's application for burial assistance, request an itemized statement of funeral expenses. Do not include the following items as a part of the total funeral expenses when provided by friends or family:

- ▶ Burial lot
- ▶ Burial vault
- ▶ Grave digging
- ▶ Burial clothing

These expenses are excluded from the maximum allowable cost of \$2500 when

provided by friends or family and are not considered a resource or part of the total funeral expense.

Consider all of the available resources of the person for whom burial assistance is requested. Pay the maximum grant of \$650 when the deceased individual has no available resources to contribute toward the expenses. The local department may establish an amount higher than \$650 if it is:

- ▶ Met by local funds, and
- ▶ In the local plan approved by the Family Investment Administration (FIA)

Example:

Mrs. Angela Anderson came into the local department on November 5 to apply for burial assistance for her mother, Mrs. Margaret Johnson. Mrs. Johnson died two days prior. Mrs. Johnson was 84 years old and still lived by herself. Her only source of income was SSI. Mrs. Anderson had her mother's death notice and social security number. (The death certificate may not be available for a couple of weeks.) The funeral director had advised Mrs. Anderson to apply at the Department of Social Services (DSS) and told her what she needed to take with her to the interview.

The case manager interviewed Mrs. Anderson and determined that Mrs. Johnson had \$100 in resources (money in a savings account). The Funeral Director provided Ms. Anderson with three different funeral arrangements. Ms. Anderson stated that they had a very small family and chose to go with funeral arrangements that cost \$2200. Mrs. Johnson had a burial lot and vault that she purchased years ago. Mrs. Anderson picked out her mother's burial clothes from clothes in her mother's closet and Mrs. Johnson's son agreed to pay for opening the grave.

The case manager advised Mrs. Anderson that the burial assistance grant could not be approved until the funeral director provided an itemized bill of the funeral costs and a Purchase Authorization Form (DHR/FIA-312).

Mrs. Anderson brought the information back on Nov. 9<sup>th</sup>. The funeral cost was \$2200 not counting the expenses Mrs. Anderson and her brother agreed to pay.

To determine the burial assistance amount, the case manager:

- ▶ Subtracts Mrs. Johnson's resource amount (\$100) from the cost of the funeral, \$2200.
- ▶ The balance of \$2100 exceeds the \$650 and is less than the \$2500 allowed.

The family is eligible to receive burial assistance of \$650. The family is responsible for the difference of the \$2200 (cost of the funeral) minus \$650 (Burial Assistance grant) which is \$1450. In local departments where there are local funds available, the family would be responsible to pay the difference in the funeral cost minus all available assistance.

On November 10, the case manager completed the work in CARES and mailed the Burial Assistance check of \$650 to the funeral director.

Burial assistance is processed on CARES following the same procedures for processing other types of emergency assistance. Burial assistance should be processed as soon as all required information is returned.

### **CARES PROCEDURES FOR BURIAL ASSISTANCE**

Use the following procedures when processing an emergency assistance case:

- ▶ Select either J or L from the **AMEN** screen (J for Screening if there is no active assistance unit; L for Add a Program if there is an active assistance unit).
- ▶ On the **KIND** screen place Y in the Select field next to Emergency Assistance and complete the Type field. Your choices are:
  - F – Family Assistance
  - L – Burial Assistance
- ▶ Complete the **INCH** screen by placing a Y in the Indicator field. Enter kind of program and type in the appropriate field. After completing the application date, press PF20 to print the ARF. The customer must sign the Assistance Request Form (ARF).
- ▶ Complete the **SCDI** screen. When you press enter, the EA assistance number is shown on the **AMEN** screen.
- ▶ Select O – Interview
- ▶ Enter all applicable information on the **EAWS** screen.
- ▶ Complete the following fields on the **EMER** screen.
  - Emergency Type – indicate category of EA (eviction, disaster, etc.)
  - Verification Used – enter code
  - Need Type – why the grant is needed (pay rent, G&E cutoff, etc.)
  - Cost of Need – amount needed to resolve emergency
  - Verification Used – enter code
- ▶ Complete the **MISC** screen.

- ▶ When the **DONE** screen appears, press PF20 – EDD to generate a copy of the Eligibility Determination Document. Have the customer sign the EDD.
- ▶ Select P – Process Application month.

Place Y in Select field for the current month. Continue to process this month. When you are processing the ongoing month, place 572 (Worker voided application) code on the **STAT** screen in the AU Status Reasons field.

NOTE: If you do not deny the ongoing month at this time and the customer comes in again to apply for another EA, you will not be able to process the application until you go in and NM the household. Please dictate on the narration screen that the ongoing month has been denied and the reason.

- ▶ Select Q – Finalize Application. The select field is pre-filled with a Y. Press enter. The next screen is the **ELIG EAFI**. If information is correct, place Y in the confirm field and press enter. Change the N in the vendor field to Y. When you press enter, the **VEND** screen will appear.
- ▶ The **VEND** screen allows you to process benefits as a vendor payment.
  - The first five fields are pre-filled and self-explanatory.
  - Select S (Split) or J (Joint) to make checks payable to the vendor.
  - Enter the Vendor ID number.
  - If you do not know the number, press PF16 –PMEN to access the Vendor File Submenu. Select “A” and type in the vendor’s name. Press enter. The vendor Name List appears displaying the Vendor’s Identification Number. Type “Y” for more information.

- ▶ On **ELIG** screen, place a Y in the Confirm field. Press enter.

The ongoing month is denied. Place Y to confirm.

A Manual Issuance process must be completed. (See below)

## **MANUAL ISSUANCE**

There are three steps in this procedure:

1. Manual Issuance Request – completed by the case manager
2. Manual Issuance Approval – completed by the supervisor
3. Manual Issuance Approval – completed by the finance office

## 1. CASE MANAGER PROCESSING

- ▶ Select M – Manual Issuance Request from the **KMEN** screen. Look for the AU ID field at the bottom of the screen. Enter the assistance unit number. Type the correct month and year in the Benefit Month field. If you are unsure of which fields to complete, type in your selection and press enter. A red asterisk will appear in all mandatory fields. If all information is correct, press **ENTER** to process the manual issuance request.

## 2. SUPERVISOR PROCESSING:

Select N – Financial Issuance Approval from the **KMEN** screen. Enter the AU ID in the field at the bottom of the screen. Review the screen. If you agree with the information, place a “Y” in the Supervisory Approval field and press enter. The next step is up to the Fiscal Office.

## 3. FISCAL PROCESSING

An alert is automatically generated letting the Fiscal Office know an EA manual issuance is waiting approval. Since all three issuance steps must be completed the same day, it would be a good idea to personally contact the fiscal office and tell them you are waiting for their approval.

**REMEMBER**            **ALL THREE STEPS IN THIS PROCESS MUST BE COMPLETED ON THE SAME DAY THE CASE IS FINALIZED.**

**ACTION DUE:** Immediately, upon receipt of this action transmittal.

**INQUIRIES:** Please direct all TCA inquiries to Marilyn Lorenzo at 410-767-7333 or [mlorenzo@dhr.state.md.us](mailto:mlorenzo@dhr.state.md.us) or Gretchen Simpson at 410-767-7937 or [gsimpson@dhr.state.md.us](mailto:gsimpson@dhr.state.md.us). All CARES inquiries to Sarah Haygood at 410-767-5054 or the DHR Help Desk at 410-767-7002.

cc:    DHR Executive Staff  
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