Record Date of Death v25.0

Triggers & Inputs

Outputs

1.0 Receive death notification

2.0 Update date of death

- Cover Assessor
- Recovery Administrator
- Recovery Assistant
- Recovery Coordinator
- Recovery Partner
- Treatment and Support Assessor

Record Date of Death v25.0

Summary

Objective
To update a client record in Eos when a client is deceased, and stopping any notifications or on-going payments.

A Client Date of Death Review task is created when ACC has matched records with the Ministry of Health (MoH) and is provided confirmation of a date of death for a client, and there is activity on the claim after the date of death.

An auto generated Date of Death task is created when a date of death is loaded into a deceased clients party record.

Background
ACC has been notified that a client has died via;
• A formal contact to ACC by email (including MyTrove notification)
• Letter or phone call
• Notification from Ministry of Health (MoH)

Owner   Name Withheld

Expert   Name Withheld

Procedure

1.0 Receive death notification

Cover Assessor, Recovery Administrator, Recovery Assistant, Recovery Coordinator, Recovery Partner, Treatment and Support Assessor

a In Salesforce, receive task advising of date of death.

NOTE **What if you do not pull tasks from Salesforce?**
The Client Date of Death Review task will automatically route to your EOS queue.

NOTE **What if you have been advised about the client's death via phone call, email or through a provider?**
Confirm you are speaking with the right person by asking ACC's identity check questions.

Confirm that the client is deceased, what the clients date of death is, and whether a death certificate will be provided to ACC.
Ensure you have taken the advisors name, phone number and relationship to the client.

Add a contact to the clients party record of the conversation and include the date of death, or file the email away as applicable.

Complete the 'Stop Notification' System steps to stop all client notifications.

Continue to 2.0a

NOTE **What if the task is about a sensitive claim?**
If the claim is sensitive, transfer the task to Weekly Compensation Sensitive Claims queue.

📄 Stop notifications

📄 Add a client contact

📄 File an inbound email

b Review the date of death task to ensure that it contains all the relevant information.

NOTE **What information should you check for in the task?**
• The clients date of death
• Any active supports identified on the claim such as weekly compensation, permanent injury compensation, continuous payments, ongoing purchase orders, or that the claim is still being actively managed.

NOTE **What if the client has an actively managed claim?**
The Client Date of Death Review task will auto-route to the case owner.

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2.0 Update date of death

Cover Assessor, Recovery Administrator, Recovery Assistant, Recovery Coordinator, Recovery Partner, Treatment and Support Assessor

a In EOS, check the party record to see if the date of death has been loaded.

NOTE **What if the date of death is not in the party record?**
• Add the date that you have been provided, either in the task, or from the phone call/email contact.
• Tick the "deceased" box, which will set the client's party record to estate.

Only tick the "deceased confirmation" box if we have received one of the following:
• Client Date of Death Review task from the Ministry of Health
• a copy of the clients death certificate
• An ACC21 Accidental Death Claim Lodgement form.

📄 Edit Party Details

NOTE **What if you receive a 'Client Date of Death Review' task?**
You will need to review the activity on the claim and take the appropriate action. This may include:
• Stopping notifications.
• Stopping any on-going payments being paid or supports provided to the client.
• Transitioning any open claims into Actioned Cases.

📄 Stop notifications

NOTE **What if there is a date of death already in the clients party record?**
Check that the date of death matches the one in the Client Date of Death Review task.
• If does not match, update it to the date provided in the task.
• If the "deceased confirmation" box is unticked, tick it.

NOTE **What if a AUTO Alert: DoD/Deceased Status has Changed task is generated?**
Close this task.

b In EOS, check the clients party record for any sensitive claims. If there are sensitive claims, transfer the task to the relevant Mental Injury team's department queue.

c Check the claim for any ongoing entitlements.

NOTE **What entitlements should you look for?**
• Entitlements such as home help, attendant care, ancillary services
• Continuous supports such as consumables, medic alert alarms, or any orders in Onelink/ Community Client.

The related purchase orders should be end dated to the date of death.

NOTE **What if there is ongoing continuous payments?**
In EOS, in the Client Support Services tab, end date any existing approvals to the clients date of death.
Review the calculation and approve the payments.

This will create a negative amount and an overpayment subcase will generate. You will need to provide information in the overpayment information section of the CSS subcase.
Details to include:
• overpayment reason - Client Deceased
• party in error - client or ACC
• Business unit (only if ACC are responsible for the error).

In the Manage Overpayment task, advise "Client is Deceased".
Once you have completed this, transfer the task to the Centralised Weekly Compensation queue.

If the claim is sensitive, transfer the task to Weekly Compensation Sensitive Claims queue.

NOTE **What entitlements do not need to be adjusted?**
• Any entitlements on a Fatal claim
• Housing modification purchase orders
• Medical notes requests

NOTE **What if the client is receiving on-going weekly compensation and you are a Recovery Team Member?**
In EOS, update the approved incapacity 'to date' to reflect the date of death. This will automatically generate a task for the payments team to process.
Make a note in the comments box that we are winding back incapacity as the client has died.

NOTE **What if the client is receiving on-going weekly compensation and you are a Recovery Administrator?**
In EOS, transfer the task to the Recovery Team/ Recovery Team Member who is managing the claim.

NOTE **What if the client is receiving Permanent Injury Compensation/Lump Sum and Independence Allowance payments?**
In EOS under the Permanent Injury Compensation tab, check if the payment dates under the Independence Allowance tab are future dated (beyond today's date).

If so, edit the Client Date of Death Review task to say "future dated IA payments" and transfer the task to the Centralised Permanent Injury Compensation – SPO queue.

d In Salesforce and or Eos, close the task.

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