100 – Purpose and Requirements

A. Burial Assistance is the state funded assistance program, authorized under the Human Services Article, §5-415, Annotated Code of Maryland, which subsidizes funeral costs for a deceased customer who is:

1. A child receiving foster care through the Social Services Administration (SSA) at DHS.

2. A public assistance recipient, even if the grant was suspended but not cancelled. Public assistance is a cash grant and includes:
   a. Public Assistance to Adults (PAA)
   b. Temporary Cash Assistance (TCA)
   c. Temporary Disability Assistance Program (TDAP)
   d. Supplemental Security Income (SSI), including the remaining recipients of the Mandatory State Supplement to SSI.

3. A recipient of Medical Assistance in a long term care facility at the time of death who, prior to admittance, received SSI.

4. A newborn child who is not part of the assistance unit if:
   a. The child’s mother receives TCA, and
   b. 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.

5. An individual who, after filing an application, is considered eligible for the Temporary Disability Assistance Program (TDAP) even though he or she has not actually received assistance.

B. Total funeral expenses cannot exceed $2,500 and the grant cannot exceed $650, except under the following circumstances:

1. Exclude the cost of a burial plot, vault, grave digging, or burial clothing contributed by family or friends from the total funeral expenses.

2. The local department may establish an amount higher than $650 but no greater than $900 if it is:
   a. Met by local funds, and
   b. In the local plan and approved by the Family Investment Administration.
200 - Funeral Arrangements:

1. 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 $2,500.
   - One choice must be between $650 and $2,500.

2. The maximum grant which a customer can receive towards funeral expenses is $650 (or up to $900 if covered by local funds as described in section 100.B.2 above).

3. The LDSS may provide burial assistance for the preparation and transportation of the body of a deceased migrant worker to the migrant’s place of origin.

4. The burial assistance may not be used to reimburse the applicant or the vendor for paid funeral expenses.
300.1 - The Application
1. When considering a customer’s application for burial assistance, request an itemized statement of funeral expenses. When paid for or provided by friends or family, do not include the following items as a part of the total funeral expenses:
   - Burial lot
   - Burial vault
   - Grave digging
   - Burial clothing

2. These expenses are excluded from the maximum allowable cost of $2,500 when provided by friends or family and are not considered a resource or part of the total funeral expense.

3. 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.

300.2 - Verification

Applicants must provide proof of:

A. Available resources
B. Death
C. Funeral arrangements

300.3 - Eligibility Determination

Determine the available resources (those easily convertible to cash) of the deceased and of each individual legally responsible for the support of the deceased.

A. Resources include the following items:
   1. Money in the bank
   2. Stocks
   3. Bonds
   4. Cash value of life insurance
   5. Death benefits
   6. Real property other than the applicant’s home.
400 – Vendor Payment

1. The local department provides burial assistance in the form of vendor payments.

2. If the applicant has not already selected a burial services vendor, the case manager assists the applicant to participate in the selection of the vendor.

3. The local department may not issue a burial payment until the vendor submits:
   - The purchase authorization (DHR/FIA-312) and invoice; and
   - An itemized statement of services provided.

4. After the applicant selects the service determine the total funeral cost
   a. Subtract available resources from $1,500 or the total funeral expenses, if less

   **EXAMPLE**
   
   $2,500  Total funeral expenses  
   -$1,900  Available resources  
   $  600  Amount due

   b. Compare the result with $650
   c. If local policy allows a higher maximum grant than $650, use that amount to determine the maximum payment
   d. Record the facts and the decision in narration and on the form specified by the local department
      - Keep the original accessible for centralized control, audit, and review
      - Scan the decision and documentation into ECMS

4. The local department must make the Burial Assistance payment within 14 working days after the vendor complies with the requirements of §3 of this section.

5. There are three steps in the manual issuance procedure, which must all be accomplished on the same day:
   a. Manual Issuance Request – completed by the case manager
   b. Manual Issuance Approval – completed by the supervisor
   c. Manual Issuance Approval – completed by the finance office

6. CARES automatically generates an alert letting the Fiscal Office know a BA manual issuance is awaiting approval.
500 - Examples:

1. 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 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 $2,200. 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. The funeral cost was $2,200 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, $2,200.
- The balance of $2,100 exceeds the $650 and is less than the $2,500 allowed.

The family is eligible to receive burial assistance of $650. The family is responsible for the difference of the $2,200 (cost of the funeral) minus $650 (Burial Assistance grant) which is $1,450. 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.

2. Ms. Franklin, who received SSI, was placed in a nursing home on August 8 when her daughter, Betsy Ross, could no longer care for her at home. Medical
Assistance was paid for Ms. Franklin’s stay in the nursing home until she died on March 5. Ms. Franklin, at the time of death, had accumulated $900 in her bank account. The funeral service vendor was willing to do the funeral, excluding burial clothing, plot, vault, and/or grave digging, for $1,500.

$1,500 Total funeral expenses
- 900 Available resources
$  600 Burial Assistance payment

The payment is $600 because it is less than the maximum of $650.

3. Mr. Hamilton, who was receiving TCA for himself, his wife, and son, died suddenly. The family has $50 in the bank from his last paycheck. Mr. Hamilton’s insurance through his employer provides $300 toward funeral expenses and the life insurance is $500. He already has a burial plot within the family vault and his brothers and sisters are pooling their money to provide the cost of burial clothing and grave digging. After deducting the cost of a plot, burial clothing, and grave digging from the expenses, the chosen funeral home still is willing to accept $1,500.

$1,500 Total funeral expenses
- 850 Available resources (cash, burial fund, life insurance)
$  650 The maximum allowable payment

4. Ms. Burr receives TCA for herself and her child. She gave birth to a second child on July 15. The child died July 20. Ms. Burr, who is in a training program, has no other available resources. The chosen funeral home will bury the child for $650.

$650 - The maximum Burial Assistance grant is made

5. Ms. Paine had begun chemotherapy and could not work. She applied for Temporary Disability Assistance Program (TDAP) and was found to be eligible. However, she passed away before any benefit was paid. Her sister applied for Burial Assistance. The chosen funeral home would not charge less than $3,000 even excluding burial plot, vault, burial clothing, and grave digging.

Burial Assistance is **denied** because the total funeral expense exceeded $2,500

The local department explains the denial and suggests that Ms. Paine’s sister find a vendor who is willing to accept $2,500 or less

5. Social Services placed Patrick Henry in Ms. Hancock’s home as a foster child two years ago when his mother was incarcerated. Patrick died from injuries received in an accident. He had a bank account containing $2,000 he had earned. Ms. Hancock found a funeral home willing to provide all funeral services for $2,500.

$2,500 Total funeral expenses
-2,000 Available resources
$ 500  Burial Assistance payment

The payment is $500 because it is less than the maximum of $650

6. Ms Hancock received TCA for herself and one child until the grant was closed for non-cooperation with work requirements. She had notified the local office that she was now willing to cooperate and had scheduled a job interview. On the way to the interview she was in an accident and died from her injuries. Ms. Hancock had no available resources. Her mother applied for burial assistance and found a funeral home willing to provide funeral services for $1,000 after deducting the cost of burial plot, vault, burial clothing, and grave digging. According to their FIA approved plan, the local department will pay up to $250 more than the $650 maximum, funding permitting. Funds were available at the time of the request.

$ 650  Burial Assistance maximum

+ 250  Local funds contribution

$ 900  Total funeral expenses

The payment is $900 ($650 + $250)
600 - Replacement of Burial Assistance Checks

The local department issues a new check to replace a burial assistance check which is lost, stolen, or not received when the vendor satisfies the requirements of this section listed in 1 through 3 below.

1. If a check is lost, stolen, or not received, the vendor shall notify the local department within 30 calendar days from the date the check was issued.

2. If the check is stolen, the vendor files a complaint with local law enforcement officials and provides a valid complaint number to the local department.

3. If the check is cashed, the vendor must sign a completed forgery affidavit form.

4. The local department issues the replacement check within 5 working days of satisfaction of the conditions in this section.

700 - Appeals

The local department shall give to each applicant or recipient of burial assistance written notification of the right to appeal, and procedures for requesting and obtaining a fair hearing as set forth in COMAR 07.01.04.
CARES Procedures for Burial Assistance

Use the following procedures when processing burial assistance:

- Select either Option 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 a ‘Y’ in the Select field next to Emergency Assistance and put a ‘L’ (Burial Assistance) in the Type field
- Complete the INCH screen by placing a ‘Y’ in the Indicator field. Enter the kind of program and type in the appropriate field. After completing the application date, press PF20 to print the ARF for the customer to sign.
- Complete the SCDI screen.
- Select Option O (Interview). Complete the following:
  - On the STAT screen for the EA AU, if the AU has several household members only pend (PN) the deceased member. All others should be coded as ‘NM’ (Non-members)
  - On the DEM2 for the deceased person enter the date of death and the state in the Date of Death field.
  - On the EAWS screen enter all applicable information.
  - On the EMER screen complete the following:
    - Emergency Type – BU (burial assistance)
    - Verification (enter the applicable code)
    - Need Type – FE (funeral expense)
    - Cost of Need (enter the amount needed)
    - Verification (enter the applicable 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 Option P(Processing)
  - Place a ‘Y’ in the select field for the current month. Complete the processing for this month. CARES will automatically deny the ongoing month.
  - Narrate your actions
- Select Option Q (Finalize) The Select field is pre-filled with a ‘Y’. Press enter.
  - Verify that the information on the EAFI screen is correct. Place a ‘Y’ in the BNT Confirmation field.
  - Change the ‘N’ in the Vendor field to ‘Y’. Press enter and the VEND screen will appear.
o On the VEND screen complete the following:
  - In the **Payment Type** field enter J (Joint) or S(Split/Direct)
  - Enter the Vendor ID number in the **Vendor Number** field. 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.

• On ELIG screen,
  - Place a ‘Y’ in the confirmation field to confirm the current month. Press enter.
  - The ongoing month is denied. Place a ‘Y’ to confirm.

**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

**NOTE:** All three steps in this process must be completed on the same day

• **Case Manager** – From the CARES main Menu select Option K (Financial Mgmt Issn)
  - Select Option M (Manual Issuance Request). Enter the AU number and the benefit month and year (mm/yy)
  - Review the information for accuracy. If all information is correct, press enter to process the manual issuance request.

• **Supervisor** – From the CARES Main Menu select option K
  - Select option N (Manual Issuance Approval). Enter the AU number and the benefit month and year (mm/yy)
  - Review the information. If all information is correct, enter a ‘Y’ in the **Supervisory Approval** Field and press enter.

• **Fiscal** – An alert is automatically generated informing the Fiscal Office that 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 contact the fiscal office and let them know that you are waiting on their approval.

• Once the case has been set up correctly in CARES for burial assistance, CARES generates a sub-code of 0333151 on the CARES 302 report under account number 3003. The 302 report displays the expenditures in the correct State column to be paid out of State funds.
The codes that display on the CARES 302 report are:

- 3001  Unmatched funds/county supplement
- 3003  Burial assistance for those customers meeting Family Investment Program requirements (Temporary Cash Assistance manual section 1302)

The following two codes are charged through MD CHESSIE.

- 2133  Flex Funds for a IV-E Foster Care child
- 7133  Flex Funds for a Non-IV-E Foster care child