Deceased Patient/Guarantor Account Resolution	RC-012
Penn State Health Revenue Cycle	**Effective Date:** September 2020

SCOPE AND PURPOSE *The document is applicable to the people and processes of the following Penn State Health components specified below:*

X	Penn State Health Shared Services		Penn State College of Medicine
X	Milton S. Hershey Medical Center	X	Medical Group – Academic Practice Division
X	St. Joseph Medical Center	X	Medical Group - Community Practice Division
X	Holy Spirit Medical Center		

To ensure compliance with regulations regarding the filing of a claim against a patient/guarantor who is deceased; that a thorough review is completed to ensure whether an estate has been established; that the debt owed will be allowed and paid when there are estate assets and that balances owed are appropriately adjusted when there is no estate or available assets.

POLICY AND PROCEDURE STATEMENTS

Penn State Health will work with the surviving spouse and/or family member(s) when his/her loved one has passed away to resolve remaining balances when notification of death has been received. See **RC-110 - Patient Expirations Occurring Outside the Penn State Health Facilities.** This may include filing a claim with the estate, completing the Financial Assistance Application and adjusting the balance upon approval or receiving payment from the patient's survivors or estate.

- In the instance of a surviving spouse, the guarantor will be changed to the surviving spouse.
  - If the surviving spouse is unable to pay or there is no estate, determine if he/she meets the qualifications for the Financial Assistance Program.
  - After unsuccessful attempts to collect the account through normal collection processes, the account balance of deceased patients is written off using the applicable adjustment transaction code.
  - If the surviving spouse is able to pay, accept payments or establish a payment plan as needed.

- If the patient is single, divorced or widowed:
  - If the balance is less than $1,000:
    - Attempt to contact the nearest relatives as noted in the billing system.
    - If unable to contact or no funds are available, the account can be considered for the Financial Assistance Program.
- If the balance is greater than $1,000:
  - Determine if there is an estate by contacting the spouse or nearest relatives as noted in the billing system or the Registry of Wills for the patient's county of residence.
  - Obtain the estate information and file a claim.
  - If there is no surviving spouse, change the guarantor to the Estate of.

RELATED POLICIES AND REFERENCES

RC-100 Patient Expirations Occurring Outside the Penn State Health Facilities

APPROVALS

Authorized:	Dan Angel, Vice President, Revenue Cycle Operations
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DATE OF ORIGIN AND REVIEWS

Date of origin: 5/1/2017

Review Date(s): 5/17, replaces St. Joseph Policy 2-1
2017 transitioned to Penn State Health combined policy, September 2020

CONTENT REVIEWERS AND CONTRIBUTORS

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