# MED D - Deceased Beneficiary

[General Information](#_Toc71551020)

[Process](#_Toc71551021)

[Related Documents](#_Toc71551022)

**Description:** This document outlines the process to follow when receiving a call regarding a deceased beneficiary.

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| General Information |

A Power of Attorney (POA) will expire and no longer be valid once the beneficiary is deceased. To handle issues, CVS Caremark must receive one of the following (copies are acceptable):

* Letters of Testamentary
* Executor of Estate
* Death Certificate and affidavit stating no one else is in line for their estate

**Address (Except for BlueMedicareRx (NEJE):**

<PBM Name>

Customer Care

PO Box 6590

Lee’s Summit, MO 64064-6590

**Blue Medicare Rx (NEJE) Mailing Address:**

Blue MedicareRx

PO Box 30001

Pittsburgh, PA 15222-0330

Blue MedicareRx Fax Number: 1-866-342-7048

**Note:** If there is a dispute regarding the beneficiary’s death refer to:

* + [MED D - Specialized Member Services Team (SMST) - Mistaken Disenrollment of a Beneficiary](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dee963eb-9ad5-453e-838a-2a26b97ffd7e)
  + [MED D - Blue MedicareRx (NEJE) - Mistaken Disenrollment of a Beneficiary](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=27411101-dd06-4169-b763-71f92ad44bc6)

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| Process |

Perform the following steps:

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| **Step** | **Action** | | | |
| **1** | Express condolences to the caller.  **Example:** “I am very sorry for your loss and I am here to help.” | | | |
| **2** | Document who is calling and the caller’s relationship to the beneficiary. | | | |
| **3** | From the **PeopleSafe – Medicare D Inquiry Tab**, determine the Enrollment status by reviewing the **Disenrollment Reason Field**.  Refer to   * [MED D – Disenrollment Transfer Procedures](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=555c53c2-76b9-4806-8a0f-382711ab4e69) * [MED D - Specialized Member Services Team (SMST) - PeopleSafe Disenrollment Reason - Processes and References](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=7d74f25f-180c-4821-a912-b3525da5f778) * [MED D - Blue MedicareRx (NEJE) - PeopleSafe Disenrollment Reason - Processes and References](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=111497fe-67a8-4a8d-9976-0a0803a90976) | | | |
| **If…** | **Then…** | | |
| Blank | 1. Add a temporary [**Stop See Comment**](file:///C:\Users\C337799\Downloads\CMS-2-007009) under the member’s profile in **PeopleSafe** with the following information:    1. Caller’s name that provided the notification of death & their relationship to the member.    2. The deceased date.    3. Place all future orders on hold until the line of eligibility can be closed. 2. Confirm enrollment status in MARx as the beneficiary is still showing as active in PeopleSafe.    1. Refer to [MED D – Verifying Enrollment, Eligibility and LIS in MARx.](file:///C:\Users\C337799\Downloads\CMS-PRD1-076166) | | |
| **If Date of Death is…** | | **Then…** |
| Blank | | * Beneficiary is active. Advise the caller that Social Security Administration (SSA) will need to be contacted.   + Refer to [MED D – Approved Referral Guidelines to Medicare and Social Security](file:///C:\Users\C337799\Downloads\CMS-2-026165).   **Note:** The funeral home may handle contacting Social Security.   * Proceed to next step. |
| Populated | | * Advise the caller that Social Security Administration (SSA) will need to be contacted.   + Refer to [MED D – Approved Referral Guidelines to Medicare and Social Security](file:///C:\Users\C337799\Downloads\CMS-2-026165).   **Note:** The funeral home may handle contacting Social Security.  **CCR Process Note:** Contact your supervisor to create an IT Service Center Ticket as there may be a communication issue between MARx and PeopleSafe.   * Proceed to next step. |
| MEMB DECEASED | Do you know if Social Security Administration has been advised that the beneficiary is deceased? | | |
| **If...** | | **Then...** |
| Yes | | Proceed to next step. |
| No | | * Advise the caller that Social Security Administration (SSA) will need to be contacted.   + Refer to [MED D - Approved Referral Guidelines to Medicare and Social Security](file:///C:\Users\C337799\Downloads\CMS-2-026165).   **Note:** The funeral home may handle contacting Social Security.   * Proceed to next step. |
| **4** | * Once Social Security Administration processes this information, Medicare will disenroll the beneficiary from their Prescription Drug Plan. * The Plan will send a letter confirming the beneficiary’s disenrollment. * If there is any balance on the beneficiary’s account, the beneficiary’s estate will receive a letter. | | | |
| **5** | Did you receive any orders after the beneficary’s passing that you need to return? | | | |
| **If...** | | **Then...** | |
| Yes | | Refer to [MED D - Return Order for Refund - Copay Credit - CCR & Senior Process](file:///C:\\Users\\C337799\\Downloads\\CMS-PRD1-099571).  Proceed to next step. | |
| No | | Proceed to next step. | |
| **6** | Do you need to request any of the following:   * Statement of Cost * Mail Services Account Balances or Credits * Reissue Check for Deceased Payee * Paper Claims * Premium Refund | | | |
| **If...** | | **Then...** | |
| * Statement of Cost * Mail Services Account Balances or Credits * Reissue Check for Deceased Payee | | Refer to [Mail Order Calls Regarding Deceased Members](file:///C:\Users\C337799\Downloads\CMS-2-010338).  Proceed to next step. | |
| Paper Claims | | Refer to [MED D - Researching and Submitting Paper Claims](file:///C:\Users\C337799\Downloads\CMS-PRD1-112394).  Proceed to next step. | |
| Premium Refund | | Refer to Death of A Beneficiary section in the appropriate document listed below:   * [MED D - Blue MedicareRx (NEJE) - Premium Billing General Information, Processes, & Document Index](file:///C:\Users\C337799\Downloads\CMS-PCP1-024894) * [MED D - SilverScript - Premium Billing General Information, Processes & Document Index](file:///C:\Users\C337799\Downloads\CMS-PCP1-026695) | |
| No additional requests | | Proceed to next step. | |
| **7** | Close the call according to normal processes. | | | |

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| Related Documents |

Grievance Standard Verbiage (for use in Discussion with Beneficiary) section in [MED D - Grievances Index](file:///C:\Users\C337799\Downloads\TSRC-PROD-007931)

**Parent SOP:** CALL-0048: [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

**Abbreviations/Definitions:** [Abbreviations / Definitions](file:///C:\Users\C337799\Downloads\CMS-2-017428)

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