Policy Title: Deceased Patient Balance Adjustments
Policy Number: 950-05-010

Responsible Officer: Executive Director, UCR Health
Responsible Office: University of California, Riverside School of Medicine
Origination Date: April 2015
Date of Revision: N/A
Scope: This policy applies to UCR Health. UCR Health billing providers outside of the UCR Physicians Billing Office are not covered by this policy.

PURPOSE:
To improve the efficiency and effectiveness of UCR Health billing and collection processes by establishing standard, uniform criteria for issuance and handling of deceased patient balance adjustments across UCR Health.

POLICY:
A. UCR Health billing vendor must first bill the healthcare insurance carrier responsible for any charges incurred for the treatment of the patient prior to his/her expiration (a copy of a death certificate must be obtained and filed with the UCR Health).

B. To handle the remaining Guarantor balances UCR Health billing vendor must first submit a formal inquiry to the probate court to verify if an estate exists. This action must be pursued in a timely manner as the executor of the estate is prohibited by law from paying late or improperly filed claims, no matter how valid the debt.

1. If an estate exists, all outstanding balances must be submitted to the executor of the estate and pursued in accordance with the UCR Health Guarantor Balance policy.
   After unsuccessful attempts to collect on the account through UCR Health normal Guarantor balance collections processes, account balances of deceased patients must be adjusted. These uncollected balances must not be assigned to the collection agency.
2. If no estate exists, balances must be adjusted upon approval by the UCR Health Executive Director or designee. If the account has been sent to the Collection Agency (CMRE), CMRE will close and return to UCR Health.

C. Guarantor balances for patients who expire while their financial hardship application is in review are eligible for an adjustment of all outstanding balances even if the financial screening process has not been completed.

APPLICABILITY:
This policy applies only to UCR Health customers. UCR Health provider entities billing for healthcare services outside UCR Physicians Billing Office are not covered by this policy.
This policy applies to all patients and their representatives who seek medical care from UCR Health.

**MONITORING/ACCOUNTABILITY:**
Each UCR Health billing area must conduct frequent, regularly scheduled quality reviews to ensure adherence to this policy. Immediate corrective actions must be taken as necessary. These may include:

a. Training and re-training of staff
b. Disciplinary actions
c. Reporting non-compliance to UCR Director, Clinical Compliance and Privacy.

**POLICY REVISION HISTORY:**
Original Policy Issued: April 2015

Revisions: None

Approval(s):

**Compliance Committee (04/26/2016)**