Guide to Completing the AISH Funeral Benefits Application

The Assured Income for the Severely Handicapped Program

Albertan

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Introduction to funeral benefits for AISH

The Assured Income for the Severely Handicapped (AISH) Funeral Benefits Guide assists the person submitting an application for AISH funeral benefits (funeral benefits) on behalf of a deceased individual who was a member of an AISH household.

The guide has three main parts:

Part 1 Funeral benefits overview

• Provides background on what funeral benefits are provided and who may apply.

Part 2 Completing the application form

Provides the steps for completing the application form depending on the situation of the deceased.

Part 3 Additional resources

Provides contact information for questions and a checklist to ensure the application is complete.

Part 1 Funeral benefits overview

Funeral benefits

Funeral benefits are available to an eligible member of an AISH household for:

- expenses related to the burial or cremation and funeral of the deceased individual within Alberta; or
- expenses related to transporting the deceased individual to another province or territory of Canada for burial or cremation outside of Alberta.

This is in scenarios when the estate of the deceased individual and any responsible survivor(s) of the deceased individual are insufficient to cover the expenses.

Benefit rates

If approved for funeral benefits for burial or cremation in Alberta, the rates are the actual costs based on invoices up to a maximum rate, depending on the funeral.

When the remains of the deceased individual are being buried or cremated <u>in Alberta</u>, the rates for funeral goods and services and cemetery expenses are:

- the actual cost up to a maximum of \$4,000 for cremation and funeral when the remains are not placed in a cemetery; or
- the actual cost up to a maximum of \$6,000 for burial or cremation when the remains are placed in a cemetery.

Note: In Alberta, cemetery plots for the burial of destitute or indigent persons are provided at 50 per cent of the regular cost as per section 12 of the <u>Cemeteries Act</u>. AISH clients, their cohabiting partners and dependent children who have died are eligible for these reduced rates.

When the remains of the deceased individual are being transported to another province or territory for burial or cremation <u>outside of Alberta</u>:

 the actual cost of preparing the remains prior to shipping and the actual reasonable cost of transportation by road and/or by airfreight.

The maximum benefit rates for burial or cremation in Alberta are set by Ministerial Order. Typically, these rates cannot be exceeded.

In exceptional and necessary circumstances where the maximum benefit rate is insufficient, additional amounts may be provided based on the request and related substantiation:

Exceptions for high cemetery costs

If the required cemetery costs exceed \$2,000, and the total requested benefit amount exceeds the maximum of \$6,000, the additional cemetery costs will be paid as an exception. In these situations:

- the applicant will not need to request an exception;
- invoices will be sufficient to substantiate the need; and
- this exception applies to:
 - a single cemetery plot;
 - cemetery perpetual fees;
 - grave opening and closing fees (plus winter fee); and
 - a grave liner.

All other exception requests

All other requests to exceed the benefit maximums will be considered on a case by case basis by the appropriate delegated authority. Examples may include:

- advanced decomposition; or
- religious requirements.

The applicant will need to request that an exemption be considered and provide information substantiating the need.

Funeral benefit expenses

Burial or cremation and funeral expenses within Alberta

Burial or cremation and funeral expenses may include a variety of goods and services. If the remains are laid to rest in a cemetery, there are also cemetery expenses. Albertans can choose the services and structure the service in a way that suits their needs, up to the maximum allowable rate. They may also select a funeral provider of their choice.

The following are examples of potential expenses, but are not a complete list:

- cremation;
- embalming and other preparations;
- casket or urn;
- ceremonial farewell;
- cemetery expenses, such as:
 - a cemetery plot;

- cemetery perpetual fees;
- grave opening and closing fees;
- a grave liner; and
- transportation within Alberta.

Transportation to another province/territory for burial or cremation

Transportation expenses may include, but are not limited to:

- preparing the human remains prior to shipping;
- hermetically sealed casket or other approved container; and
- transportation by road and/or by airfreight to another province/territory for burial or cremation.

Definitions

Applicant: The individual submitting the funeral benefit application on behalf of the deceased individual. See the applicant for funeral benefits section of this guide for more information.

Responsible survivor: A responsible survivor is expected to financially contribute toward the cost of funeral services.

A responsible survivor is defined as the:

- cohabiting partner of the deceased;
- legal parents of a dependent child; or
- legal sponsor of a sponsored immigrant.

The definitions for cohabiting partner and dependent child can be found in section 1(2)(a) and 1(2)(b) of the <u>AISH General Regulation</u>.

Non-responsible survivor: A non-responsible survivor is any other family member, friend, or organization, not considered a responsible survivor, who may assist with funeral service arrangements for the deceased individual.

Depending on who is available to make the arrangements for the deceased individual, the application for funeral benefits may be submitted by a non-responsible survivor.

A non-responsible survivor is not required to contribute financially toward funeral expenses.

Other available program or source: A resource provided from another program or source intended to cover funeral expenses.

If there are other available resources, the deceased individual is not eligible for funeral benefits. Other available resources include, but are not limited to:

- Victims of Crime Assistance Program, if the deceased is eligible under the <u>Victims of Crime and</u> <u>Public Safety Act</u>;
- motor vehicle accident victim benefits for funeral expenses, if the deceased is eligible under the <u>Automobile Accident Insurance Benefits Regulation</u>; or
- the Last Post Fund, if the deceased was a Canadian Forces veteran.

Eligibility - Assured Income for the Severely Handicapped

Funeral benefits may be available for a deceased individual who was an AISH client, cohabiting partner or dependent child at the time of the death, if eligibility criteria are met.

If the deceased individual was not a member of an AISH household at the time of death, please see the applicable guide:

- Income Support Funeral Benefit Application Guide for individuals who were part of an IS household at the time of the death.
- Low income Albertan Funeral Benefit Application Guide for individuals who were not part of an AISH or IS household at the time of the death.

Funeral Benefits are issued as a personal benefit by the AISH program. In order to be eligible for funeral benefits:

- the non-exempt assets of the client and the cohabiting partner must not exceed \$5,000;
- there must be a demonstrated need; and
- the same or a similar benefit must not be available from any other program or source.

You can find out more information on AISH and AISH eligibility on the <u>website</u> (alberta.ca/aish.aspx).

Applicant for funeral benefits

The person completing the application for funeral benefits should be the individual who is able to make final arrangements for the deceased individual.

Section 36 of the <u>Funeral Services General Regulation</u> sets out who is able to make arrangements, based on their relationship to the deceased individual.

If the person who has the right to make arrangements is not available, or is unwilling, the right passes to the next person on the list.

The order of priority for who has the right to arrange for the remains of the deceased individual is as follows:

- (a) the personal representative designated in the will of the deceased;
- (b) the spouse or adult interdependent partner of the deceased if the spouse or adult interdependent partner was living with the deceased at the time of death;
- (c) an adult child of the deceased;
- (d) a parent of the deceased;
- (e) a guardian of the deceased under the <u>Adult Guardianship and Trusteeship Act</u> or, if the deceased is a minor, under the <u>Child, Youth and Family Enhancement Act</u> or the <u>Family Law</u> <u>Act</u>;
- (f) an adult grandchild of the deceased;
- (g) an adult brother or sister of the deceased;
- (h) an adult nephew or niece of the deceased;
- (i) an adult next of kin of the deceased determined on the basis provided by sections 67 and 68 of the *Wills and Succession Act*;
- (j) the Public Trustee;

- (k) an adult person having some relationship with the deceased not based on blood ties or affinity;
- (I) the Minister of Human Services (Community and Social Services).

Note: In some situations the spouse or adult interdependent partner may not have been living with the individual who passed away, such as if one person was in a care facility due to health reasons.

The person completing the application should be the available person with the highest priority on the above list. If there is a responsible survivor of the deceased, that person may or may not be the applicant.

The applicant will need to coordinate with any responsible survivor(s) (see definitions section) to gather the required information to complete the application.

Ability to submit the application

If, to your knowledge, you are the person with the highest priority available, but you do not have access to all of the information about the deceased individual at the time of death, such as address or the availability of other resources, please include as much information on the application form as you can.

If there is another individual with a relationship to the deceased individual, please contact that person before submitting the application to determine who is the most appropriate person to complete the application and, if applicable, to identify if they have any information you are not aware of.

In some cases, if an applicant does not have sufficient information in the application, the Office of the Public Guardian and Trustee may need to be contacted for assistance in locating information on the deceased.

Understanding the application process

Submit the funeral benefits application as soon as possible following the death, so eligibility for benefits can be determined.

Applications are processed by the Health and Funeral Benefits Unit (HFBU). Once the application is received by the HFBU, they will review it to ensure the necessary information has been submitted.

If necessary, the HFBU will work with the applicant to collect missing information required to make a decision, by contacting the applicant by email or letter.

Once the HFBU has reviewed the application and determined whether the application is approved or denied, they will contact the applicant and inform them:

If Approved	If Denied
 the application has been approved; the maximum amount that may be claimed, depending on the type of funeral benefit; how to submit the invoice(s) and death certificate for payment; and who to contact for questions. 	 the application has been denied; the reason for the denial; who to contact for questions; the applicant's options, including their ability to appeal the decision; and how to provide additional information.

Initial approval or denial notification will be made by email, if an email is provided, and a written letter will also be sent including all of the relevant information regarding the approval or denial.

The following chart outlines the key steps in the application process, if the application is approved:

Form Completed

Applicant completes the application form and submits along with necessary documents

Decision Made

HFBU makes the eligibility decision. If required information is missing, HFBU will contact applicant for the information. Program informs the applicant of the decision

If Approved, Invoices Submitted

If approved, the applicant submits final invoice(s), payment direction form, and death certificate to the HFBU

If Approved, Payment Issued

Once HFBU receives the invoice(s), payment is issued up to maximum benefit amount

Submitting the application

Follow these steps to submit the complete application and avoid delays in processing:

- 1. Use the checklist included in the application form to ensure the requested documents you have access to are included.
- 2. Keep copies of the application and supporting documents for your records.
- 3. Submit your application as per the instructions on the form by email, fax or mail.

Submitting by email:

- <u>CSS.FuneralBenefits@gov.ab.ca</u>
- Subject line: Include Funeral Benefits Application

Submitting by fax:

- 780-643-9228 or toll-free 1-855-643-9228
- TO: Health and Funeral Benefits Unit
- SUBJECT: Funeral Benefits Application

Submitting by mail:

 Health and Funeral Benefits Unit Community and Social Services, Government of Alberta PO Box 805 STN MAIN Edmonton AB T5J 2L4 If you have not included enough information for the HFBU to make a decision, you will be contacted for more information.

It is recommended email or fax be used to submit the application, to support the timely review of the application.

If you are completing the fillable application form online and submitting the application by email, it is encouraged that you save your application using the print to PDF function, if you are able, to support timely processing. See the additional resources section at the end of this guide if you are unsure of how to save as a PDF.

The application form

There are three different application forms depending on the situation of the deceased individual prior to death. Ensure you select the correct form depending on the situation.

Visit the <u>website</u> at alberta.ca/funeral-benefits.aspx and select the application form.

- AISH Funeral Benefits Application form;
 - When the deceased individual was an AISH client, cohabiting partner of an AISH client, or a client's dependent child at the time of death.

Supporting documentation

In addition to the completed application form, certain pieces of supporting documentation will be used to substantiate the information provided. It is important to provide the requested information you have access to.

The application form will indicate where supporting documentation is required. Part 2 of this guide provides additional information on what types of documentation may be required to accompany the completed form.

Part 2 Completing the application form

Completing the AISH funeral benefits application form:

Section 1: Funeral benefits

Information is collected on the type of funeral benefit being applied for, to assist with determining if the request falls within the allowable expenses and to understand where payment should be directed, if approved.

Typically, benefits will be issued directly to the service providers. If the deceased individual was your cohabiting partner or dependent child, you may request payment be issued to you. If you make this request, you will be responsible for arranging payment to service providers.

How to complete

Select the type of funeral benefit and provide the requested information about the date of the services.

If you select the transportation funeral benefit, you will need to fill out the lines indicting the estimated cost and location the remains will be shipped to.

This section of the form includes three statements with check boxes. If you understand and agree with these statements, check the boxes. If you do not understand or do not agree with these statements and would like to discuss, see the contact information at the end of this guide:

- one statement advises you of the requirement to submit invoices and a death certificate before payment will be issued, regardless of being preapproved;
- one statement informs you of how payment will be directed to the service providers; and
- one statement advises you that if services were paid for prior to submitting the application, you may not be eligible.
- ! **Please note**: In this situation, the invoice would be considered paid if it was paid in full, or an amount equal to or exceeding the benefit maximum has been paid, prior to the application being submitted.
- ! **Documentation required:** If applying for transportation expenses to another province or territory, please provide a quote/estimate of expenses from the service provider(s).

Section 2: Applicant's information

We collect your information to confirm your identity, know how to contact you regarding the application, understand your relationship to the deceased individual, and if applicable, to direct payment.

It is important for us to understand your relationship to the deceased individual to ensure you are the appropriate person to be applying for funeral benefits.

Please note: It is important the email address and phone number you provide are accurate. Your address and email will be the form of contact for staff to communicate questions about the application and to notify you of the outcome. During the application process, please check your mail and email regularly.

How to complete

Complete the first part of this section by providing your information. Please ensure you provide your primary phone number and email address.

- ! **Documentation Required:** Please provide copies of proof of identification. Acceptable forms include:
 - Driver's license
 - Passport
 - Birth, marriage, baptismal certificates
 - Personal health card
 - Social insurance card
 - Employee, student ID cards
 - Bank or credit card

- Certificate of Indian Status Card
- Firearms Acquisition Certificate
- School, health, hospital records
- Parole card
- Vehicle registration/insurance
- Non-driver ID card

On the checklist, check the relationship which best describes your relationship to the deceased individual. The list is provided in order of priority.

If there is another individual who has a relationship to the deceased that is higher on the list, please see the "Applicant for funeral benefits" section above.

If you are not the highest person available on the list, but there is a reason the other individual(s) is unable or unwilling to complete this application, explain in the space provided. If the HFBU is not able to proceed with you as the applicant, they will contact you to advise.

Section 3: Details of the deceased information

Information is collected on the deceased individual to confirm identity and to verify Alberta residency.

How to complete

Complete this section, including checking the appropriate marital status and status in Canada.

Section 4: Other available resources

Determining if the deceased individual is potentially eligible for funeral benefits from another source may impact eligibility for funeral benefits. If a funeral and related expenses are provided by another source, the AISH program does not provide funeral benefits.

<u>Other program or source</u> – If any of the following situations apply to the deceased individual, there may be eligibility for funeral expenses from another program or source. If so, those resources must be applied for or used before eligibility for funeral benefits can be determined. Funeral benefits will not be provided if another program or source is responsible for providing a benefit for funeral expenses.

If the deceased individual:

- was a client of the Public Trustee prior to their death, funeral arrangements should be requested through the Public Trustee.
- was a veteran of the Canadian Armed Forces, there may be benefits through the <u>Last Post</u> <u>Fund</u>.
- died in a workplace injury, there may be benefits through the Workers' Compensation Board.
- died as a result of a motor vehicle accident, there may be benefits through the <u>Automobile</u> <u>Accident Insurance Benefits Regulation</u>.
- died as a result of a violent crime, there may be benefits through the Alberta Victims of Crime program.
- a child in care under the <u>Child, Youth and Family Enhancement</u> Act, there may be benefits under that Act.
- was potentially eligible for any other program or source that may provide benefits, funeral benefits should be requested from these sources first.

How to complete

Complete all parts of the section indicating yes or no to whether the deceased individual may be eligible for benefits through another source.

! **Documentation required:** If you answer yes to the deceased being potentially eligible for any other program or source, include a copy of the denied benefit request from the appropriate source.

Section 5: Reimbursement

In the event the invoice is paid in full prior to the application being submitted, the AISH program may provide personal benefits for up to six months after the expenses were incurred, if eligibility criteria would have been met at the time of the expense.

In this situation, the invoice is considered paid:

- if it was paid in full prior to the application being submitted, or
- if an amount equal to or exceeding the maximum benefit amount has been paid prior to the application being submitted.

How to complete

If requesting a reimbursement, complete this section, including providing the reason preapproval was not obtained.

If you are not requesting a reimbursement, just check "No" to the question about seeking reimbursement and leave the rest of the section blank.

! **Documentation required:** If submitting a request for reimbursement, include invoices of expenses.

Section 6: Declaration and signature

It is important to read all of the sections of the declaration. In signing, you are agreeing you have read and understand the declaration.

The application cannot be processed if the declaration section is not signed by you.

How to complete

Read the declaration statement. If you understand and agree with the statement, date, print and sign on the signature line. Be sure to include a scanned copy or a photo of this signed page with your application.

If you do not understand one of the parts of the declaration section and would like to discuss, see the contact information at the end of this guide.

Part 3 Additional resources

Checklist

Documentation to be included with the completed application form:

Required documentation			
Section 2: Proof of identification of the applicant			
Documentation required depending on situation			
	Section 1: Estimate of preparation and shipping cost		

 If requesting benefits for the transportation of the deceased individual's body to another province/territory
Section 4: Proof of denial from applicable other program or source
If the deceased individual may have been eligible for funding from one of the
listed sources, proof of denial or value of benefit provided must be submitted to
determine eligibility for funeral benefits
Section 5: Invoices of funeral and burial or cremation expenses or transportation
expenses
If applying for a reimbursement

If approved, the notification letter will advise of the documentation required in order for payment to be issued. This includes:

- invoice(s) from the funeral service provider (i.e. funeral home), cemetery, or shipper, as applicable;
- the death certificate, either the Funeral Director's Statement of Death or Official Death Certificate; and
- the Payment Direction form, which will be included along with the approval notification.

How to save as a PDF

In order to save your application form using the save to PDF function:

- once you complete your form, select 'file' in the top left;
- select 'Print' from the dropdown menu;
- change your printer to the 'Microsoft Print to PDF' option;
- a save print window will open, enter a file name and select a saving location like you would when saving any other document on your device;
- select 'save'; and
- a copy of your application form will now be saved in the location you selected.

Contact

If you have questions about completing, submitting or a decision on an application, please contact:

Health and Funeral Benefits Unit

Toll-free: 1-855-638-4443 Edmonton: 780-638-4443 Office hours: 8:15 a.m. – 4:30 p.m., Monday to Friday, closed statutory holidays

If you are an AISH client, and the deceased individual was a member of your household, you can contact your AISH worker for general questions on eligibility and the application process.

If you do not know how to reach your worker, visit or call an office location near you between 8:15 a.m. and 4:30 p.m. from Monday to Friday. For TTY service, call 1-800-232-7215 or 780-427-9999 in Edmonton. AISH office locations and TTY services are closed during statutory holidays.

Athabasca AISH Office	Barrhead AISH Office	Bonnyville AISH Office
Duniece Centre	Provincial Building	5201 44 Street
3rd Floor, 4810 50 Street Athabasca,	6203 49 Street, Box 4597	Box 4663
AB T9S 1C9	Barrhead, AB T7N 1A5	Bonnyville, AB T9N 0H1
Phone: 780-675-6853	Phone: 780-674-8209	Phone: 780-815-4041
Fax: 780-674-8366	Fax: 780-674-8366	Fax: 780-840-2005
Bow Corridor AISH Office Provincial	Calgary East – Westland Alberta	Camrose AISH Office
Building	Supports Centre	Gemini Centre
3rd Floor, 800 Railway Ave Canmore,	2752 Sunridge Way NE Calgary,	3rd Floor, 6708 48 Avenue
AB T1W 1P1 Phone: 403-678-2363	AB T1Y 0A5	Camrose, AB T4V 4S3
Fax: 403-297-6221	Phone: 403-297-8511	Phone: 780-608-2539
1 4. 403-237-0221	Fax: 403-297-6221	Fax: 780-608-4078
Cold Lake AISH Office	Crowsnest Pass AISH Office	Drayton Valley AISH Office
#408, 6501B 51 Street	Provincial Building	5136 51 Avenue
Box 698	12501 20 Avenue, Box 870	Box 7595
Cold Lake, AB T9M 1P2	Blairmore, AB TOK 0E0	Drayton Valley, AB T7A 1S7
Phone: 780-840-2002	Phone: 403-562-3285	Phone: 780-542-3134
Fax: 780-840-2005	Fax: 403-562-3247	Fax: 780-621-4022
Drumheller AISH Office		
	Edmonton AISH Office	Edson AISH Office
Riverside Centre,	Westcor Building	Provincial Building
2nd Floor, 180 Riverside Dr,	#500, 12323 Stony Plain Road Edmonton, AB T5N 4B4	#102, 111 54 Street
Box 2079 Drumheller, AB TOJ 0Y0 Phone: 403-823-1616	Phone: 780-415-6300	Edson, AB T7E 1T2 Phone: 780-723-8215
Fax: 403-823-1777	Fax: 1-844-686-9358	Fax: 780-674-8366
Fort McMurray AISH Office	Grande Prairie AISH Office	High Level AISH Office
Provincial Building,	Town Centre Mall	Provincial Building
7th Floor, 9915 Franklin Avenue	#100, 9845 99 Avenue	10106 100 Avenue
Fort McMurray, AB T9H 2K4	Grande Prairie, AB T8V 0R3	High Level, AB TOH 1Z0
Phone: 780-743-7106	Phone: 780-833-4399	Phone: 780-841-4335
Fax: 780-743-7100	Fax: 780-833-4397	Fax: 780-926-2114
High Prairie AISH Office	Hinton AISH Office 568	Lac La Biche AISH Office
Provincial Building	Carmichael Lane	Provincial Building 9503
2nd Floor, 5226 53 Avenue, Box 849	Hinton, AB T7V 1S8	Beaverhill Road, Box 2643
High Prairie, AB TOG 1E0	Phone: 780-817-3790	Lac La Biche, AB TOA 2CO
Phone: 780-523-6651	Fax: 780-674-8366	Phone: 780-623-5361
Fax: 780-624-6212	Fax. 780-074-8300	Fax: 780-840-2005
	Lloydminston AISH Office	Medicine Hat AISH Office
Lethbridge AISH Office Provincial	Lloydminster AISH Office	
Building	Provincial Building	Provincial Building
200 5 Avenue S	2nd Floor, 5124 50 Street	#201A, 346 3 Street SE
Lethbridge, AB T1J 4L1	Lloydminster, AB T9V 0M3	Medicine Hat, AB T1A 0G7
Phone: 403-381-5186	Phone: 780-871-6418	Phone: 403-529-3550
Fax: 403-388-3136	Fax: 780-871-6408	Fax: 403-529-3662
Morinville AISH Office Provincial	Olds AISH Office	Peace River AISH Office
Building	4500 50 Street	Provincial Building
2nd Floor, 10008 107 Street	Olds AB, T4H 1R6	1st Floor, 9621 96 Avenue
Morinville, AB T8R 1L3	Phone: 403-507-8060	Peace River, AB T8S 1T4
Phone: 780-939-1239	Fax: 403-556-8940	Phone: 780-624-6135

Fax: 1-844-686-9358		Fax: 780-624-6212
Red Deer AISH Office	Rocky Mountain House	Slave Lake AISH Office
Provincial Building	Provincial Building	Government Centre
#109, 4920 51 Street	4919 51 Street, Box 1180,	#108, 101 3 Street SW
Red Deer, AB T4N 6K8	Rocky Mountain House, AB	Box 70
Phone: 403-340-7077	T4T 1A8	Slave Lake, AB TOG 2A0
Fax: 403-755-6171	Phone: 403-845-8590	Phone: 780-849-7216
	Fax: 403-845-8330	Fax: 780-624-6212
St. Paul AISH Office	Vegreville AISH Office	Westlock AISH Office
Provincial Building	5121 49 Street	Ron Dales Building
#309, 5025 49 Ave, Box 46	Box 1590	11304 99 Street
St. Paul, AB TOA 3A4	Vegreville, AB T9C 1S7	Westlock, AB T7P 0A4
Phone: 780-614-6511	Phone: 780-632-8686	Phone: 780-349-7729
Fax: 780-614-6418	Fax: 780-603-2460	Fax: 780-674-8366
Wetaskiwin AISH Office	Whitecourt AISH Office	
Macadil Building	Midtown Mall	
Main Floor, 5201 51 Avenue	2nd Floor, 5115 49 Street	
Wetaskiwin, AB T9A 0V5	Whitecourt, AB T7S 1N7	
Phone: 780-361-5163	Phone: 780-778-7226	
Fax: 780-361-5164	Fax: 780-614-6418	