



**DEPARTMENT OF HUMAN SERVICES**  
**SENIOR & DISABLED SERVICES DIVISION**  
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**AUTHORIZED BY:** \_\_\_\_\_

**SDSD Administrator/Deputy/  
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**INFORMATION MEMORANDUM**

**SDSD-IM-00-66**

**Date: July 6, 2000**

**TO:** SDSD District and Unit Managers  
AAA Directors

**SUBJECT:** Transferring ACCESS Files to the Estate Administration Unit (EAU)

**INFORMATION:** Executive Letter 99-17 enumerated the process field units were to follow in transferring the ACCESS file to the EAU upon the death of a client. In that transmission, field units were requested to transfer the ACCESS file to EAU within 10 working days of branch notification of the death of the client. This procedure has generally worked very well. However, there are unusual circumstances in which it may be necessary for the field unit to retain the ACCESS file beyond the 10 working days. If there is ongoing activity on the case that will require the unit to keep the ACCESS case beyond 10 days, the following protocol should be followed:

1. The worker should secure authorization from their supervisor that the case needs to be retained in the field unit beyond 10 working days.
2. The worker should fax a copy of the completed 454D to EAU at (503) 378-3137 and indicate on the cover sheet when it is anticipated the case will be transferred. EAU will then begin the process of identifying assets upon which a claim can be made.

In some instances a case may have already been transferred to EAU when a problem arises. EAU will work with field units to ensure that any information they need from the ACCESS file, that is not contained in the hard file, will be provided to them. If necessary, EAU can re-transfer the ACCESS case back to the field unit.

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