

Complete a UMDAP Financial Assessment, Paper Cost Agreement, and Paper ABN (if applicable) for non-UMDAP clients.

This process is for clients with Full Scope Medi-Cal, SOC Medi-Cal, & DAS Grant Funded Programs. The AA will need to complete a paper cost agreement and explain what happens if the client loses their Medi-Cal coverage. Give paper cost agreement to your clinic HIT for scanning. An UMDAP Financial Assessment in SmartCare will also need to be completed, as well as a paper ABN (for MH clients with Medicare insurance), for all MH in person assessments.

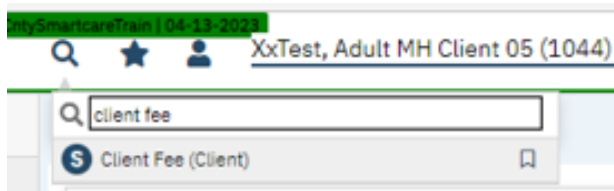
THERE SHOULD ONLY BE ONE CURRENT UMDAP FINANCIAL ASSESSMENT IN THE SYSTEM. THIS WILL BE SHARED BY BOTH MH & DAS PROGRAMS.

If a client needs an UMDAP (for clients with Medicare Only, Private Insurance, or no insurance/funding source), an UMDAP will need to be set by the service provider. The service provider will need to complete the UMDAP Financial Assessment (on paper) & set the UMDAP. Once done, they will give to the AA to enter in to SmartCare. HIT will verify.

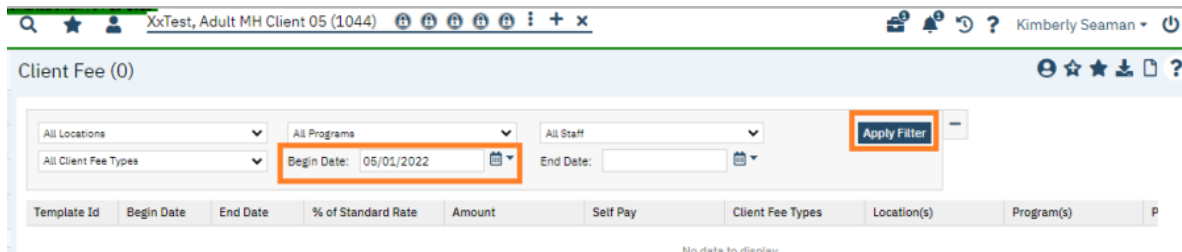
AA should check insurance status for all intakes and clients scheduled with prescribers the day before the scheduled appointment. If a client has lost their Medi-Cal coverage or falls within one of the insurance categories listed above, they will require an UMDAP. AA should send an email notification to the service provider and Program Supervisor (also recommend clinic case manager) informing a paper UMDAP Financial Assessment is needed.

Start by ascertaining if a current UMDAP is already in the system.

With the client open, search **Client Fee**. Select **Client Fee (Client)**.

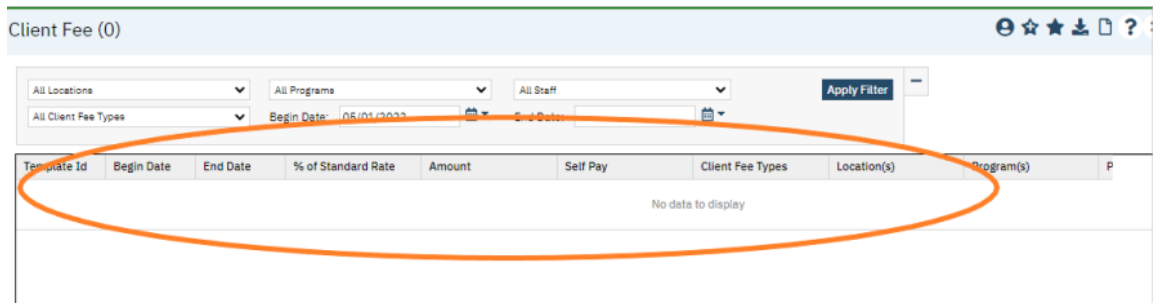


Set the begin date to go back one full year and click apply filter. (Leave all other fields set as All.)



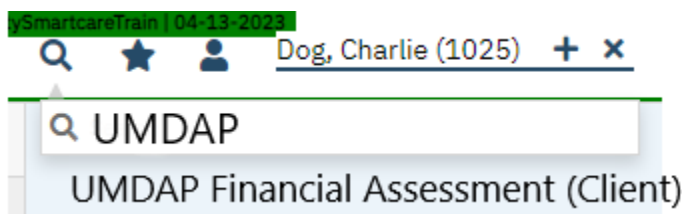
If nothing is shown in this field, you may proceed with entering a new UMDAP Financial Assessment. Note: if there is a current UMDAP in place, the annual start and end dates, along with the UMDAP amount, will display here. If the start and end dates are within the current time client is starting services with us, you do not need to obtain a new UMDAP Financial Assessment.

THERE SHOULD ONLY BE ONE UMDAP FINANCIAL ASSESSMENT IN SMARTCARE PER ANNUAL PERIOD.



Complete a UMDAP Financial Assessment

1. With the client record open, click the Search icon.
2. Type **UMDAP** into the search bar.
3. Click to select **UMDAP Financial Assessment (Client)**.



4. In the Responsible Party tab, complete the outlined sections. (Some fields will populate with info from the Client Information screen. You will only need to complete any fields that are still blank within the outlined sections)
 - a. If the client is the responsible party, select the radial button next to yes and their info will auto-populate. Answer if client is Medi-Cal eligible.
 - b. If the client is not the financially responsible person, start typing in the last name of the financially responsible person and if they are listed in the contact section on the Client Information screen, their name will show. (If they are not in the contact section on the Client Information screen, you will need to add them and ensure you check the financially responsible box.) Select their name and their info will auto-populate. Answer if client is Medi-Cal eligible.
 - c. You may complete the other sections in this tab if the information is known, but it is not required.

Effective 05/22/2023 Status New Author So Co, Test Front Office 05/10/2023 Sign

Responsible Party Third Party Information Financial Liability UMDAP Liability Determination Other Information

Responsible Party Information

Client is Responsible Party Yes No

Name Search Contact

Date of Birth

Address

Home

Billing

Veteran Yes No

Employer

Employer's Address

Medi-Cal Eligible Yes No

Relationship to Client

Marital Status

Telephone Number

Home DNC DNLM

Business

Home 2

Business 2

Social Security Number

Position

Employer Telephone Number

5. In the next tab (Third Party Information) the insurance information will pull over the Coverage screen.
 - a. Check yes for Assignment/Release of Information obtained.

Effective 05/22/2023 Status New Author So Co, Test Front Office 05/10/2023 Sign

Responsible Party **Third Party Information** Financial Liability UMDAP Liability Determination Other Information

Third Party Information

Insurance

Medicare Policy ID Number

Address

Home

Billing

Insurance ID

Medi-Cal CIN

Assignment/Release of information obtained Yes No

6. In the Financial Liability tab, enter the annual period start date (first day of the month in which they are beginning services.) The annual period end date will auto-calculate.
 - a. Enter responsible person/client income amount. Enter \$0 for spouse and other. Enter number of dependents on income.

UMDAP Financial Assessment

Effective 05/22/2023 Status In Progress Author So Co, Test Front Office 05/15/2023 Sign

Responsible Party Third Party Information **Financial Liability** UMDAP Liability Determination Other Information

Annual Period

Annual Period Start Date 05/01/2023 Annual Period End Date 04/30/2024

Income

Responsible person	\$	
Spouse	\$	
Other	\$	
Total gross monthly family income	\$	
Number dependent on income		

7. In the UMDAP Liability Determination tab, enter \$0 in all fields in the Liquid Assets section and the Allowable Expenses section. You can use the tab button to quickly navigate through these fields.

Note: the allowable expenses section has defaulted \$0 amounts, but you will need to go through each one and re-enter 0 for it allow you to sign the form.

UMDAP Financial Assessment

Effective 05/22/2023 Status New Author So Co, Test Front Office 05/10/2023 Sign

Responsible Party Third Party Information Financial Liability **UMDAP Liability Determination** Other Information

Liquid Assets

Savings	\$	
IRA, CD, Market Value of Stocks, Bonds and Mutual Funds	\$	
Checking Accounts	\$	
Total of liquid assets	\$	
Less Asset Allowance	\$	
Total net liquid assets	\$	
Monthly Asset Valuation	\$	

Asset Determination

Adjusted gross monthly income \$ 0

Allowable Expenses

Court ordered obligations paid monthly	\$ 0.00	Monthly child care (necessary for employment)	\$ 0.00
Monthly dependent support payments	\$ 0.00	Monthly medical expense payments	\$ 0.00
Monthly medical expense payments in excess of 2% of gross income			\$ 0.00
Monthly mandated deductions from gross income for retirement plans (not Social Security - Allowance made in payment schedule)			\$ 0.00
Total allowable expenses			\$ 0.00

Adjusted Monthly Income

Adjusted gross monthly income minus total allowable expenses \$ 0.00

UMDAP Liability Determination

Annual Liability \$
Agreed upon payment plan to satisfy the above liability \$
Adjusted Annual Liability (if applicable) \$

Note: If the client has a SOC, continue with the process of setting the UMDAP amount based on their dependents and income. The system will automatically update SOC information when the MMEF file is run each month.

8. In the Other Information tab, select the yes radial button next to an explanation of the UMDAP liability was provided (since you had client sign a paper cost agreement.) Sign the form.

The screenshot shows the 'UMDAP Financial Assessment' form with the 'Other Information' tab selected. The status is 'New' and the author is 'Seaman, Kimberly'. A 'Sign' button is highlighted in the top right. In the 'Other Information' section, the 'Adjusted Reason' dropdown is set to 'An explanation of the UMDAP liability was provided', and the 'Yes' radio button is selected.

9. Remove the client signature. (Client signature on the UMDAP Financial Assessment is not required for non-UMDAP clients since it was already obtained on paper cost agreement.)

The screenshot shows the 'UMDAP Financial Assessment' form in 'Document' view. The status is 'Signed'. A '+' icon in the top right corner is highlighted, indicating the next step in the process.

The screenshot shows the 'UMDAP Financial Assessment' form in 'Signed By' view. The status is 'Signed'. The 'Signed By' section shows a list of signers, including 'Kimberly Seaman ON 05/25/2023 (1)'. The 'Signer' dropdown is set to 'With Fictional, ...', and the 'X' icon next to it is highlighted.

10. Click X to close.

The screenshot shows the 'UMDAP Financial Assessment' form in 'Document' view. The status is 'Signed'. The 'Client ID: 400008' is displayed at the bottom left, and 'Page 1 of 3' is displayed at the bottom right. The 'X' icon in the top right corner is highlighted.

Next, go to the search button and type in **Client Account**. Select **Client Account (Client)**.



Check the "financial information is complete" box. X to close.

