

How to complete a paper UMDAP Financial Assessment for UMDAP clients.

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

AA completes the paper cost agreement identifying the client's funding source and explains what happens if the client loses their Medi-Cal coverage.

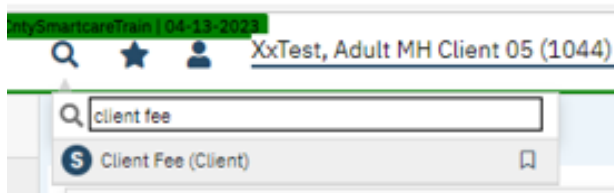
If a client needs an UMDAP...

Service Providers are responsible for completing this five-page cost agreement doc from SmartCare, the AA will enter, and HIT will verify.

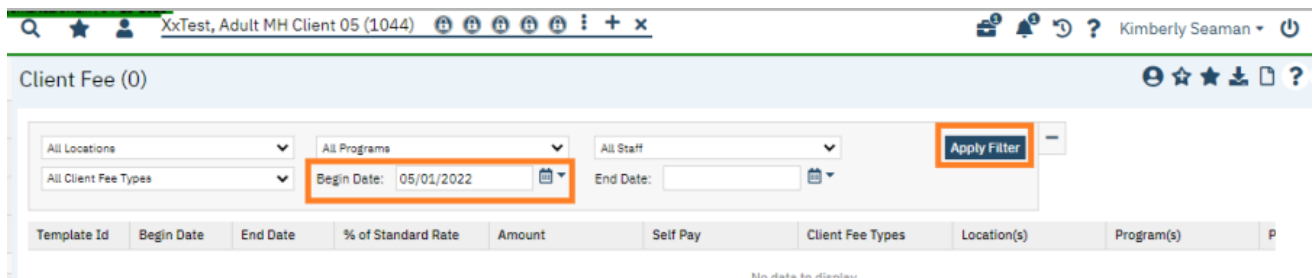
For clients with Medicare Only, Private Insurance, or no insurance/funding source, an UMDAP will be set by the service provider. The service provider will need to complete the UMDAP Financial Assessment (on paper) & set the UMDAP. Once completed, the service provider will give to the clinic AA to enter in to SmartCare.

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

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



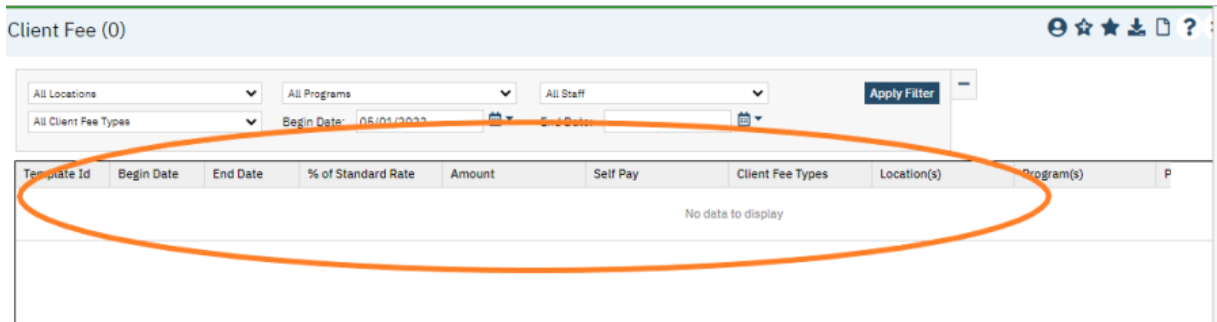
Set the begin date to go back one full year and click apply filter. (Leave all other fields set as All.)



If nothing is shown in this field, you may proceed with entering a new UMDAP Financial Assessment.

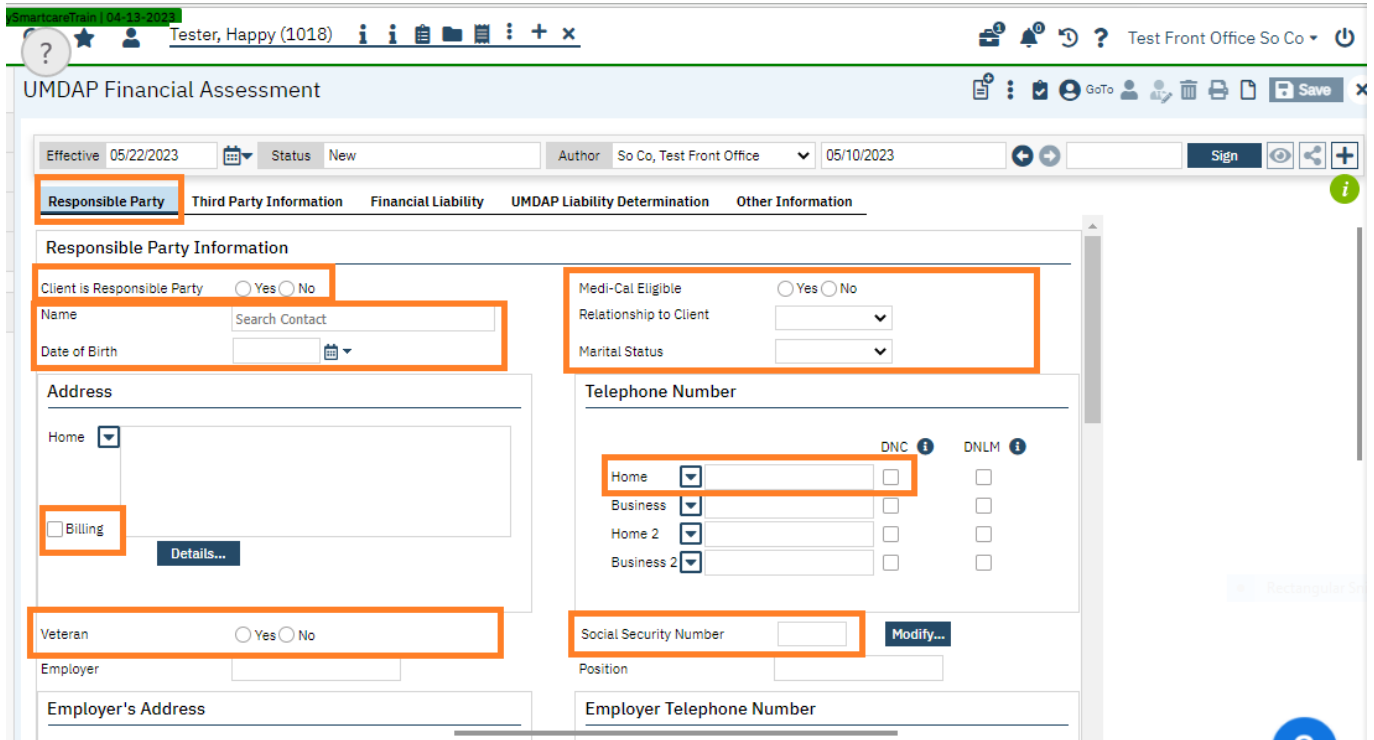
Note: if there is a current UMDAP in place, the annual start and end dates, along with the UMDAP amount, will display here. If the start and end dates are within the current time client is starting services with us, you do not need to obtain a new UMDAP Financial Assessment.

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



Complete a paper UMDAP Financial Assessment

1. On the Responsible Party page, complete the outlined sections. If the client is the responsible party, select the radial button next to yes. Answer if client is Medi-Cal eligible.
 - a. If the client is not the financially responsible person, put in the name of the financially responsible person. Answer if client is Medi-Cal eligible.
 - b. You may complete the other sections on this page, but it is not required.



2. On the next page (Third Party Information) indicate the insurance information.
 - 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 [Details](#)

Insurance ID
 Medi-Cal CIN
 Assignment/Release of information obtained Yes No

3. On the Financial Liability page, enter the annual period start date (first day of the month in which they are beginning services) and end date.
 - a. Enter responsible person/client income amount. Enter income amounts for spouse and any other income client may have. Enter number of dependents on income.

Effective 05/30/2023 Status New Author Seaman, Kimberly

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	\$ 1200
Spouse	\$ 0
Other	\$ 0
Total gross monthly family income	\$ 1200.00
Number dependent on income	1

4. On the UMDAP Liability Determination page, ask client for amounts and enter in all fields in the Liquid Assets section and the Allowable Expenses section.

- a. Calculate the Annual Liability amount. If you need to adjust this amount, enter the adjusted amount into the Adjusted Annual Liability field.
- b. Indicate the monthly amount client can pay in the Agreed upon payment plan to satisfy the above liability field.

UMDAP Financial Assessment

Effective 05/30/2023 Status New Author Seaman, Kimberly

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

Liquid Assets

Savings	\$ 50
IRA, CD, Market Value of Stocks, Bonds and Mutual Funds	\$ 0
Checking Accounts	\$ 1000
Total of liquid assets	\$ 1050.00
Less Asset Allowance	\$ 1500
Total net liquid assets	\$ 0.00
Monthly Asset Valuation	\$ 0.00

Asset Determination

Adjusted gross monthly income \$ 1200

Allowable Expenses

Court ordered obligations paid monthly	\$ 0	Monthly child care (necessary for employment)	\$ 250
Monthly dependent support payments	\$ 0	Monthly medical expense payments	\$ 50
Monthly medical expense payments in excess of 2% of gross income			\$ 26.00
Monthly mandated deductions from gross income for retirement plans (not Social Security - Allowance made in payment schedule)			\$ 0
Total allowable expenses			\$ 276.00

Adjusted Monthly Income

Adjusted gross monthly income minus total allowable expenses \$ 924.00

UMDAP Liability Determination

Annual Liability	\$ 89	Adjusted Annual Liability (if applicable)	\$ 50
Agreed upon payment plan to satisfy the above liability	\$ 5		

5. On the Other Information page, enter in the name of the person you obtained the financial information from (if other than the client).

- a. If you adjusted the annual liability amount, enter your name in the adjusted by field, enter the reason for the adjustment in the adjusted reason field, add your name to the approved by field

and select the approval date. (If you did not adjust the annual liability amount, leave these fields blank.)

- b. Select the yes radial button next to an explanation of the UMDAP liability was provided.
- c. Sign the form. Obtain client's signature. Give the paper form to clinic AA to enter in to SmartCare.

UMDAP Financial Assessment

Effective: 05/30/2023 Status: In Progress Author: Seaman, Kimberly **Sign** Save

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

Other Information

Provider of Financial Information (if other than patient or responsible person)

Name: Adjusted by: Seaman, Kimberly

Approved by: Seaman, Kimberly Adjusted Reason: Therapeutic Exemption

Approval Date: 05/30/2023 An explanation of the UMDAP liability was provided: Yes No

Address

Home:

Billing:

Details...