

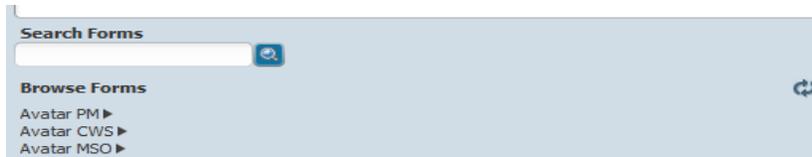
Financial Eligibility (Avatar)

Overview

Manage how financial liability is distributed to a client's guarantors

Menu Path

Avatar PM > Client Management > Account Management or you can enter “Financial Eligibility” under Search Forms



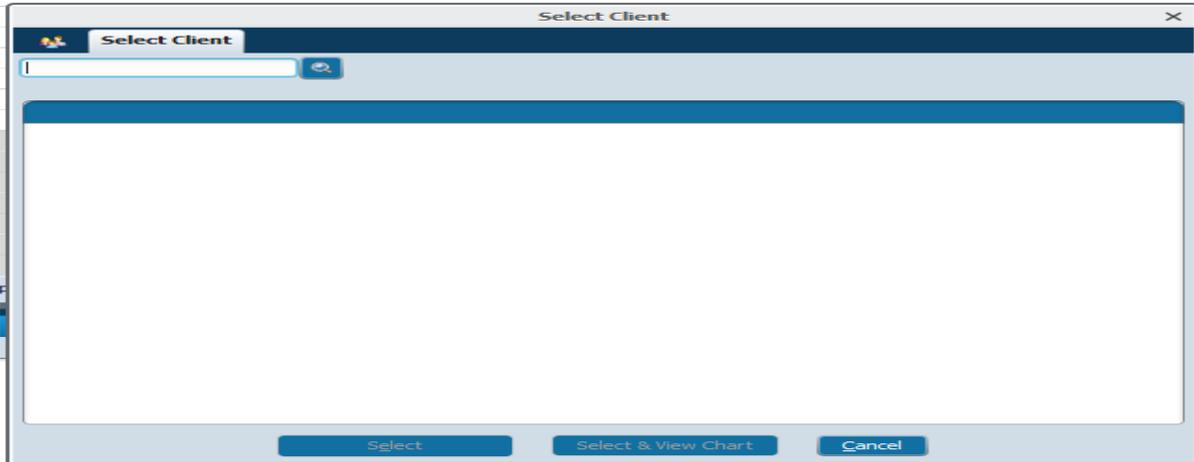
Details

How financial eligibility works:

- Avatar Cal-PM confirms that client records exist in the Financial Eligibility or Fast Financial Eligibility form.
- If a record is found, liability is processed.
- This process is repeated until the total client liability is distributed, or no client guarantors remain.
- If no guarantors are available and there is remaining liability, liability is distributed to the Netsmart Default Payor (99999).

Steps

1. In the Select Client screen, enter the client ID in the Client Name/ID field, click the Search button, and select the corresponding entry.



- If the client has multiple episodes the episode pre-display shows. Select the episode, click OK.

Episode	Program	Start	End
30	4-EPISODE MHSA (ESD)	08/04/2016	
22	2-EPISODE ALCOHOL & DRUG	09/11/2012	
17	3-EPISODE MHSA (FIP)	06/30/2008	06/07/2017
29	Safe Harbor Crisis House	10/04/2016	10/04/2016
28	Safe Harbor Crisis House	08/30/2016	08/30/2016
27	0-TRUAGE EPISODE	08/11/2016	11/30/2016
26	John Muir Behavioral Health Center IP	01/20/2016	01/20/2016
25	YPSA Woodland	01/04/2016	03/03/2016
24	Turning Point ACT Davis 1 S1	08/27/2015	03/23/2016
21	International Service Group	01/08/2014	07/07/2014

- The Episode Number, Admission Date, and Program fields display the client's information.

4. Optional (NOT in use): In the **Default Information From Different Episode** field:
 - Select Yes to copy guarantor information from another episode (Episode To Default From field).
 - Select No to create a new guarantor record for the episode.

5. Optional (Continued from Step 5 – Not in use): In the **Episode To Default From** field, select the client episode.

6. The **Social Security Number** field displays the client’s social security number (this number is pulled from the SSN entered in the Admission form).

 Access to the Social Security Number field is defined in the User Definition, and User Role Definition forms (Social Security Number Access field). This is defined by a system administrator. The user may be able to:

 - Enter new data for a client, edit and view data.
 - Enter new data for a client, and view data.
 - Enter new data for a client.

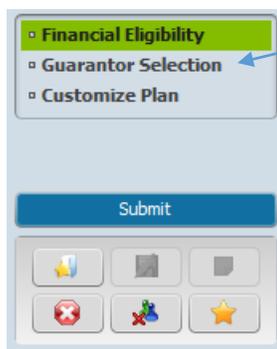
7. The **Financial Investigation Medicaid Number** and **Financial Investigation Medicare Number** fields display the Medicaid and Medicare numbers (Financial Investigation form).

8. Optional (NOT is use): In the **Link to Financial Eligibility from Another Episode** field, select Yes to allow the user to link eligibility to another episode. This will retain the link to the subscriber's MEDS ID when filing. In the **Episode to Link to** field, select the linked episode.

9. In the **Coverage Comments** field, enter comments associated with guarantor coverage. Entries should consist in the format of Date of Comment – Comment, initials of person entering note.

Guarantor Selection

1. Select Guarantor Selection in the left hand corner.



Guarantor Information

Guarantor #	Guarantor Name	Guarantor Plan	Customize Guarantor Plan	Guarantor's Address - Line 1
Grant/Special ...	Grant/Special Funded	7	No	137 N Cottonwood St

Guarantor #

Guarantor Name

Guarantor Plan

Customize Guarantor Plan
 Yes No

Guarantor's Address - Line 1

Guarantor's Address - Line 2

Guarantor's Address - Zipcode

Guarantor's Address - City

Guarantor's Address - State

Guarantor's Phone Number

Inhibit Billing By Mail
 Yes No

Effective Date Of Contract

10. Next to the Guarantor Information table, click the Add New Item button.
11. In the Guarantor # field, enter the guarantor number, click the Search button, and select the corresponding entry. (For a list of current guarantors, run report Guarantor List Report).
12. In the Guarantor Name field, the name associated with the Guarantor # will auto populate.
13. In the Guarantor Plan field, the benefit plan associated with the Guarantor # will auto populate.
14. In the Customize Guarantor Plan field:
 - Select Yes to customize the benefit plan. Yes is available if Yes is selected for the guarantor in the Allow Customization Of Guarantor Plan field (Guarantors/payers form).
 - Select No to use the default benefit plan information.
15. In the Guarantor's Address fields, the guarantors demographic date should default from the Guarantor's/Payer's form.
16. Optional (NOT in use) In the Inhibit Billing my Mail:
 - Select Yes to prevent creating a claim, and printing a bill for the client.
 - Select No to allow client billing of the guarantor.

 This field is used for self-pay guarantors, and works with paper billing.
17. In the Effective Date Of Contract field, the first day guarantor liability can be distributed will auto populate.

Expiration Date Of Contract [Date Picker] [T] [Y] [M]	Subscriber Address - Street Line 2 [Text Field]
Is This A Managed Care Contract <input type="radio"/> Yes <input checked="" type="radio"/> No	Subscriber Address - Zip 95695
Insurance Code/Medicaid Tape 1	Subscriber Address - City WOODLAND
Eligibility Verified <input type="radio"/> Yes <input type="radio"/> No	Subscriber Address - County Yolo
Coverage Effective Date [Date Picker] [T] [Y] [M]	Subscriber Address - State CALIFORNIA
Coverage Expiration Date [Date Picker] [T] [Y] [M]	Subscriber Phone Number 530-555-5555
Client's Relationship To Subscriber Self	Subscriber's Social Security # 000-00-0000
Subscriber's Name TESTCLIENT,YOLO	Subscriber Sex <input type="radio"/> Female <input checked="" type="radio"/> Male <input type="radio"/> Unknown
Subscriber Address - Street Line 1 137 N COTTONWOOD	Subscriber Marital Status [Dropdown]
	Subscriber's Employment Status Not In Labor Force - Other Not ...
	Subscriber's Birth Date 05/06/1967 [Date Picker] [T] [Y] [M]

18. In the Expiration Date Of Contract field, enter the last day guarantor liability can be distributed.
19. In the Eligibility Verified field, select Yes or No if client eligibility has been verified. If No is selected, liability does not distribute on the client ledger and is not included in an interim billing batch.
20. In the Coverage Effective Date field, enter the first coverage date. Services dated on or after this date can be distributed to the guarantor.
21. In the Coverage Expiration Date field, enter the last coverage date. Services dated on or after this date will not be distributed to the guarantor.
22. In the Client's Relationship To Subscriber field, select the relation, this may auto populate if there is information contained within Update Client Data form. If the fields do not auto populate, entry for each demographic information will be required.

Subscriber Employee ID # [Text Field]	Subscriber Group Name [Text Field]
Subscriber Employer Name [Text Field]	Subscriber Group # [Text Field]
Subscriber Employer ID Number [Text Field]	Subscriber Policy # [Text Field]
Subscriber Employer 's Add - Street [Text Field]	Subscriber Medicare # [Text Field]
Subscriber Employer Add - Zip [Text Field]	Subscriber MEDS ID # [Text Field] [Clear]
Subscriber Employer 's Add - City [Text Field]	Subscriber Client Index Number [Text Field] [Lightbulb]
Subscriber Employer Add - County [Dropdown]	Subscriber Branch/Service [Dropdown]
Subscriber Employer 's Add - State [Dropdown]	Subscriber Military Status [Dropdown]
Subscriber Work Phone [Text Field]	Subscriber Treatment Auth. <input type="radio"/> Yes <input type="radio"/> No
Subscriber Mobile Phone Number [Text Field]	
Subscriber Phone Other [Text Field]	

23. In the Subscriber Employee ID #, enter the employee number for the subscriber.
24. In the Subscriber Employer Name, enter the employer name for the subscriber.
25. In the Subscriber Employer ID #, enter the employer ID number for the subscriber.
26. In the Subscriber Group Name field, enter the group name for the subscriber.
27. In the Subscriber Group # field, enter the group name for the subscriber.
28. In the Subscriber Policy # field, enter the subscriber policy number. The policy number is required for electronic billing.
29. In the Subscriber Medicare # field, enter the client's Medicare number.
30. The 'Medi-Cal Eligibility' fields are populated by data from the MEDS record with the latest effective date. These fields do not affect liability distribution. If there is a MEDS record for the effective date, and the eligibility code or aid code does not match the Eligibility Code or Aid Code fields, the values in these fields will populate the MEDS record. If there is no MEDS record for the effective date, a new record will be created.
31. In the Subscriber Client Index Number field, enter the subscribers CIN #
32. In the Subscriber Treatment Auth. field, select Yes if the subscriber is authorized for treatment.

The screenshot shows a web form with the following sections and fields:

- Subscriber Release Of Info:**
 - Radio buttons for "No" and "Yes".
 - Coordination Of Benefits: Radio buttons for "Yes" and "No".
 - Date Of Accident: Date field with "T", "Y", and "M" buttons.
 - Date Benefits Terminated: Date field with "T", "Y", and "M" buttons.
 - Date Benefits Denied: Date field with "T", "Y", and "M" buttons.
 - Denial Code: Dropdown menu.
 - Subscriber's Covered Days: Text input field.
- Subscriber Assignment Of Benefits:**
 - Radio buttons for "Yes" and "No".
 - Subscriber's ID Card Issue Date: Date field with "T", "Y", and "M" buttons.
 - Eligibility Inquiry (270) Status: Radio buttons for "Request Inquiry", "Inquiry Sent", "None", "Inquiry Requested", and "Response Received".
 - Eligibility Response (271) Reject Reason Code: Dropdown menu.
- Medi-Cal Eligibility:**
 - Effective Date Of Medi-Cal Eligibility: Date field with "T", "Y", and "M" buttons.
 - Eligibility Code: Dropdown menu.
 - Aid Code: Text input field.
 - EVC Tracking Number: Text input field with a lightbulb icon.
- Other Fields:**
 - Number Of Days For Interim Billing: Text input field.
 - Maximum Covered Dollars: Text input field.
 - Lifetime Reserve Days: Text input field.

33. In the Subscriber Release Of Info field, select the release authorization status/type. Select Yes if the subscriber authorizes the release of client benefit information.

34. In the Coordination Of Benefits field, select Yes if benefits are synchronized between multiple guarantors in a client's financial eligibility.

35. In the Subscriber Assignment Of Benefits field, select Yes if the subscriber has authorized payments to be sent directly to the provider.