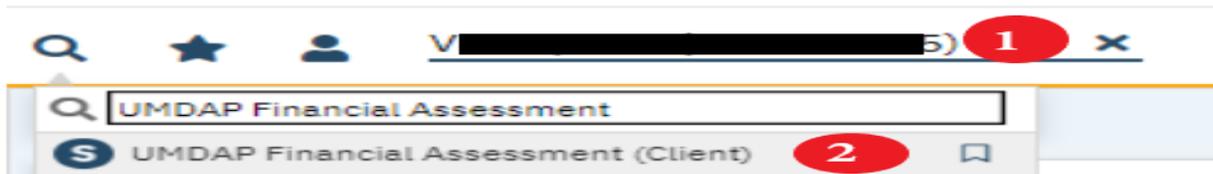


UMDAP FINANCIAL ASSESSMENT IN SMARTCARE

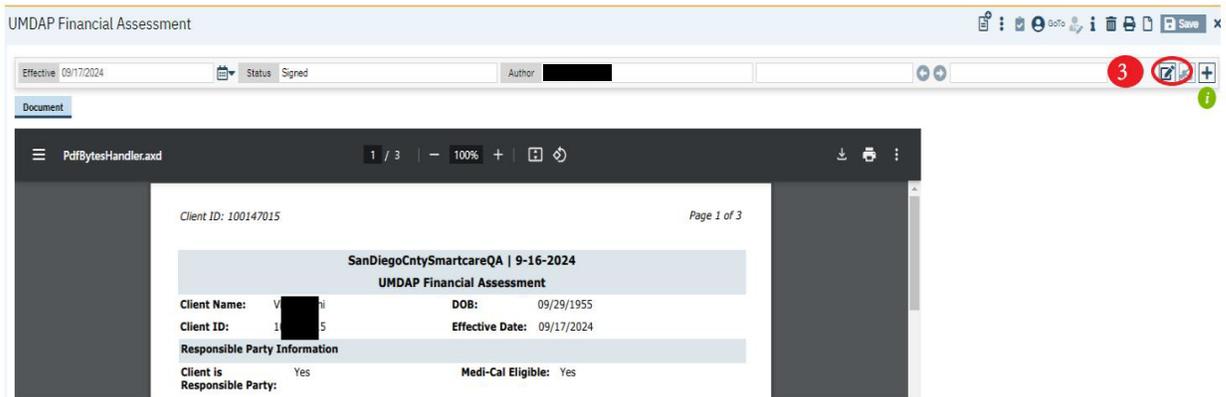
Effective 9/1/2024, MH programs will now be responsible for entry, update and maintenance of their Client's UMDAP document/information in SmartCare. All ACTIVE UMDAP records in CCBH were migrated to SmartCare and is accessible (based on your user role and access) for edits or annual updates.

To update an existing UMDAP document (migrated from CCBH)

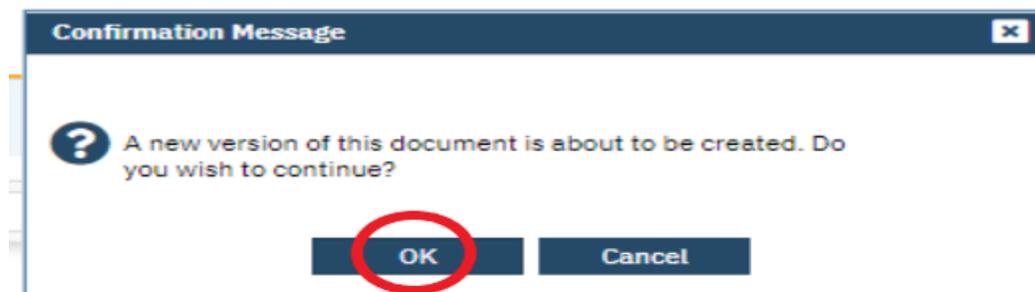
1. Click on the client icon and search for your client.
2. Using the magnifying glass at the top left of your SmartCare home page, search for and select **UMDAP Financial Assessment (Client)**.



3. UMDAP Financial Assessment document opens. Click on the **Edit** button on the top right hand of the screen.



When Confirmation Message pops up, click **OK**.



UMDAP FINANCIAL ASSESSMENT IN SMARTCARE

- There five (5) different sections/tabs in the UMDAP Financial Assessment document. Each tab holds both demographics and financial information that the system use to determine client's ability to pay. Locate the specific data you wish/need to update, update information then click **Save**.

UMDAP Financial Assessment

Effective: 09/17/2024 Status: In Progress Author: [REDACTED]

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

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

Client is Responsible Party Yes No

Name [REDACTED]

Insurance Medicare Policy ID Num [REDACTED]

Annual Period

Annual Period Start Date 11/01/2023

Liquid Assets

Income	Savings	\$ 0
	IRA, CD, Market Value of Stocks	\$ 0
	Bonds and Mutual Funds	\$ 0
Responsible person	Checking Accounts	\$ 1258

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)

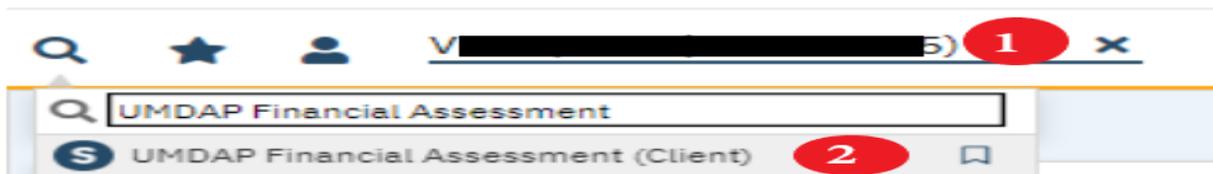
Name [REDACTED] Adjusted by system admin

Approved by system admin Adjusted Reason File Import

Approval Date 09/17/2024 An explanation of the UMDAP liability was provided

To create a new document (for new clients or annual update)

- Click on the client icon and search for your client.
- Using the magnifying glass at the top left of your SmartCare home page, search for and select **UMDAP Financial Assessment (Client)**.



- UMDAP Financial Assessment document opens. Click on the **New** button on the top right hand of the screen.

UMDAP Financial Assessment

Effective: 09/17/2024 Status: Signed Author: [REDACTED]

Document

PDFBytesHandler.axd 2 / 3 | 100% + | [REDACTED]

Insurance Company: [REDACTED] Address: [REDACTED]

Insurance ID: [REDACTED] Assignment/Release of Information obtained: [REDACTED]

Medicare Policy ID Number: [REDACTED] Medi-Cal CIN: 9 [REDACTED] C

Annual Period

Annual Period Start Date: 07/01/2023 Annual Period End Date: 06/30/2024

New

4. New document opens.

- **Effective** = defaults to today's date
- **Status** = New
- **Author** = defaults to the logged-in user who is completing the document in the system. The date next to the author's name reflects the last time the financial assessment was updated/completed.



Responsible Party

- Client is Responsible Party
 - If yes, client's demographics from Client Information screen defaults.
 - If no, key name of contact on Search Contact field. System will pull information from contact's list in Client Information screen.
- Medi-Cal Eligible – click Yes if client is eligible, No if not eligible.
- Relationship to Client – choose Self if client and responsible party is the same person. Otherwise, choose applicable relationship value.

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

Responsible Party Information

Client is Responsible Party Yes No

Name

Date of Birth

Address

Home San Diego, CA 92124

Billing [Details...](#)

Veteran Yes No

Employer

Medi-Cal Eligible Yes No

Relationship to Client

Marital Status

Telephone Number

Home DNC DNLM

Business DNC DNLM

Home 2 DNC DNLM

Business 2 DNC DNLM

Social Security Number [Modify...](#)

Position

Third Party Information

- If client is “uninsured” or does not have any type of third-party coverage or insurance, leave this section blank.
- If UMDAP financial assessment was completed in the past, system will pull in third party information from that record.

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

Third Party Information

Insurance

Insurance ID

Medicare Policy ID Number

Medi-Cal CIN

Assignment/Release of information obtained Yes No

Address

Home

Billing [Details...](#)

Financial Liability

- Annual Period
 - Annual Period Start Date for new clients should be the 1st of the month UMDAP will be effective.
 - Annual Period End Date for new clients will default to 365 days from the Annual Period Start Date.
- **NOTE:** For existing clients with UMDAP record on file, Annual Period Start and End Date will automatically default based on last reporting period.
- Income
 - Zero (0) is an acceptable value in any currency (\$) field. Otherwise, enter information provided by the client.
 - Number dependent on income – if client only, enter 1. Any value entered on this field will be used by the system to determine the amount that automatically populates the Less Asset Allowance field under Liquid Assets of the UMDAP Liability Determination tab.

Responsible Party	Third Party Information	Financial Liability	UMDAP Liability Determination	Other Information
Annual Period				
Annual Period Start Date	02/01/2024	Annual Period End Date	01/30/2025	
Income				
Responsible person	\$			
Spouse	\$			
Other	\$			
Total gross monthly family income	\$			
Number dependent on income				

UMDAP Liability Determination

- **Liquid Assets**
 - Zero (0) is an acceptable value in any currency (\$) field except for Less Asset Allowance. If information is provided by client, please enter on appropriate field.
 - Less Asset Allowance – system automatically populates this field based on value entered on Number dependent on income field under Financial Liability tab.
- **Asset Determination** – calculated by the system based on information provided.
- **Allowable Expenses** – provided by client
- **Adjusted Monthly Income** – calculated by the system based on total allowable expenses.
- **UMDAP Liability Determination**
 - Adjusted Annual Liability (if applicable) – is determined by the program staff collecting information from the client.
 - Agreed upon payment plan to satisfy the above (Annual Liability) liability – is established by the program and client.

UMDAP FINANCIAL ASSESSMENT IN SMARTCARE

Responsible Party	Third Party Information	Financial Liability	UMDAP Liability Determination	Other Information
Liquid Assets				
Savings	\$	<input type="text" value="0"/>		
IRA, CD, Market Value of Stocks, Bonds and Mutual Funds	\$	<input type="text" value="0"/>		
Checking Accounts	\$	<input type="text" value="0"/>		
Total of liquid assets	\$	<input type="text" value="0.00"/>		
Less Asset Allowance	\$	<input type="text" value="1500"/>		
Total net liquid assets	\$	<input type="text" value="0.00"/>		
Monthly Asset Valuation	\$	<input type="text" value="0.00"/>		
Asset Determination				
Adjusted gross monthly income	\$	<input type="text" value="200.00"/>		
Allowable Expenses				
Court ordered obligations paid monthly	\$	<input type="text" value="0.00"/>	Monthly child care (necessary for employment)	\$ <input type="text" value="0.00"/>
Monthly dependent support payments	\$	<input type="text" value="0.00"/>	Monthly medical expense payments	\$ <input type="text" value="0.00"/>
Monthly medical expense payments in excess of 2% of gross income				\$ <input type="text" value="0.00"/>
Monthly mandated deductions from gross income for retirement plans (not Social Security - Allowance made in payment schedule)				\$ <input type="text" value="0.00"/>
Total allowable expenses				\$ <input type="text" value="0.00"/>
Adjusted Monthly Income				
Adjusted gross monthly income minus total allowable expenses	\$	<input type="text" value="200.00"/>		
UMDAP Liability Determination				
Annual Liability	\$	<input type="text" value="37"/>	Adjusted Annual Liability (if applicable)	\$ <input type="text" value="0"/>
Agreed upon payment plan to satisfy the above liability	\$	<input type="text" value="0"/>		

Other Information

- Name - Provider of Financial Information is other than patient or responsible person.
- **Adjusted by** – completed by program
- **Adjusted Reason** -completed by program
- **Approved by** - completed by program
- **Approval Date** - completed by program
- **An explanation of the UMDAP liability was provided? Yes, or No**

REMINDER: You will receive Validation errors if required fields are not completed.

Validations 🔍 ✖

Other Information - Other Information - Adjusted by is required

Other Information - Other Information - Adjusted Reason is required

Other Information - Other Information - Approved by is required

Other Information - Other Information - Approval Date is required

Other Information - Other Information - An explanation of the UMDAP liability was provided is required

