**CBHS Mental Health & Substance Abuse Programs**

**Centralized Financial Eligibility – Provider & CBHS Billing Process Flow**

1A) PFI is required for Existing Clients

1B) Client has a change in their healthcare coverage or in their financial status (i.e., now has insurance or has lost their job, etc.)

1C) OR, the UMDAP Liability Due Report generated once/month by Providers, lists Clients whose annual PFI will expire or has expired, and an annual renewal is due.

2A) Client’s financial & eligibility info (PFI) obtained by Intake or Admin Staff @ Clinic, BHAC, FMP, FC, etc.

2B) During annual PFI renewal, Providers determine if there were changes to the Client’s health coverage and financial information since the last PFI was completed.

3A) If Client’s health coverage changed, enter update info into the eGuarantor form. (Do not fill it out if there are no changes)

3B) Update and renew the Client’s UMDAP information in the Avatar CalPM/Family Registration screen. Print the PFI Consent form and have the Client or RP confirm their financial & eligibility information on the form and obtain their signature for billing. Provide a copy of the signed form to the Client.

3C) The CSI (MH) or CalOMS (SA) Periodic data set is also due at the same time as the Client’s annual PFI. Obtain Clients’ CSI or CalOMS information and complete the appropriate Avatar Periodic Update screen.

3D) NOTE: SA Providers are required to review and update PFI annually. But, SA Providers do NOT enter data into Avatar Family Registration for Clients

4A) CBHS Billing generates a daily report listing eGuarantor forms completed by Providers. Eligibility and coverage info is verified. Client’s FE record created for the Provider’s Episode.

4B) If errors or omissions are found, Billing notifies the Program’s designated contact Staff about correction(s) and actions needed.

4C) CBHS Billing generates monthly SDMC, Medicare, and Insurance claims, Patient billing statements, based on Clients’ PFI info

4D) Avatar Reports show Program & Client Services billed to third party payers and other funding sources

5A) Financial Eligibility Report in Avatar / CalPM is available for Providers to review Clients’ FE records

5B) Avatar Users have “Read-only” access to Clients’ Financial Eligibility records