

## My Avatar – Family Registration Guide

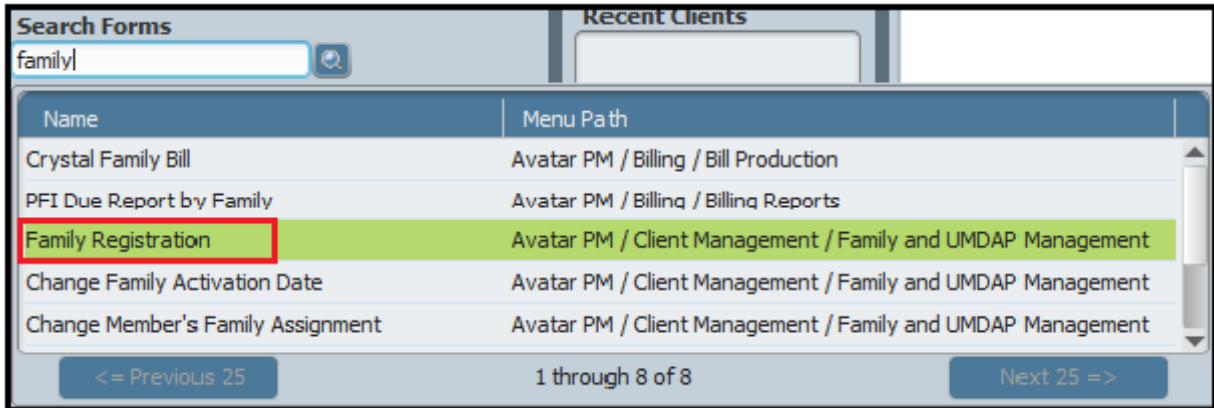
This **Family Registration Form** is used to register a Family in the system. Each Family Account represents the Client or Client's Responsible Party as a "Payer", to calculate the yearly income of a household for annual **UMDAP** (Uniform Method of Determining Ability to Pay) liability for mental health services.

**Menu path:** →

**Avatar PM / Client Management / Family and UMDAP Management / Family Registration**

### Add a new Family Account

Go to **Search Forms** field, type "family" and press Enter. A dropdown list will display a list of matching Menu Path. Select "Family Registration" from the dropdown list and double-click it.



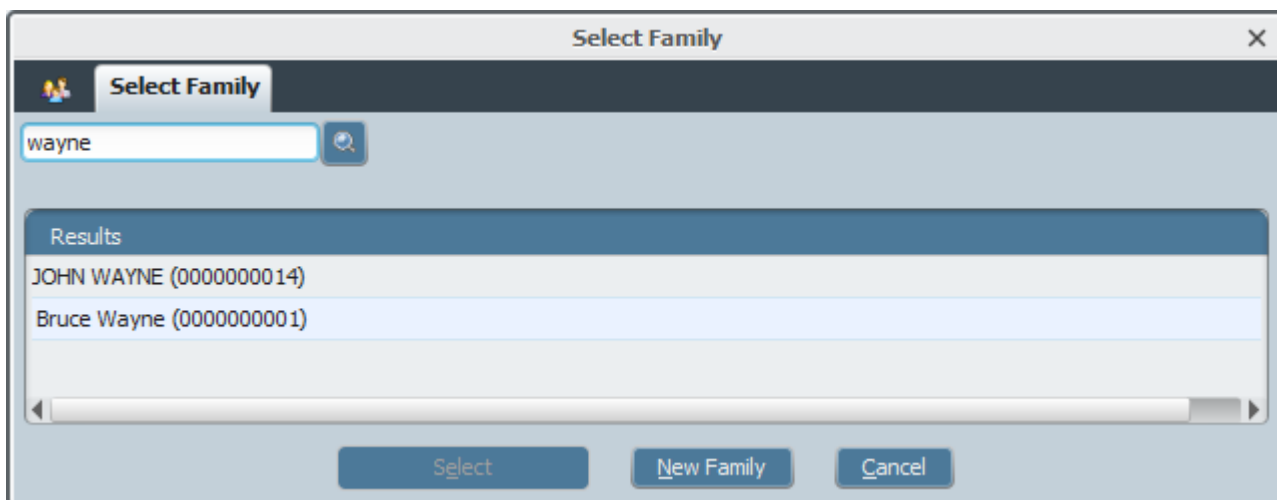
The screenshot shows a software interface with a search bar containing the text "family". Below the search bar is a dropdown menu with the following items:

Name	Menu Path
Crystal Family Bill	Avatar PM / Billing / Bill Production
PFI Due Report by Family	Avatar PM / Billing / Billing Reports
<b>Family Registration</b>	<b>Avatar PM / Client Management / Family and UMDAP Management</b>
Change Family Activation Date	Avatar PM / Client Management / Family and UMDAP Management
Change Member's Family Assignment	Avatar PM / Client Management / Family and UMDAP Management

At the bottom of the dropdown menu, there are navigation buttons: "<= Previous 25", "1 through 8 of 8", and "Next 25 =>".

**TIP:** The Family Registration option is included in the MH Outpatient Admission Bundle for a new client. Or it can be selected using the menu path above, or through Search Forms, which can be added in My Forms too.

Go to "Select Family" screen field. Click the **New Family** button, to launch the **Family Registration Form** (if a client does not already have an active Family Account #).



The screenshot shows a window titled "Select Family" with a search bar containing the text "wayne". Below the search bar is a list of results:

Results
JOHN WAYNE (0000000014)
Bruce Wayne (0000000001)

At the bottom of the window, there are three buttons: "Select", "New Family", and "Cancel".

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The screenshot shows the 'Family Registration' form. On the left is a navigation menu with 'Family Registration', 'Family Members', and 'UMDAP Information'. The main form area is divided into sections: 'Family Name' (Wayne, Bruce), 'Family's Address - Street' (1600 Market St), 'Family's Address - Street 2' (empty), 'Family's Address - Zipcode' (94102-5910), 'Family's Address - City' (San Francisco), 'Family's Address - State' (CALIFORNIA), 'Family Activation Date' (01/01/2009), and 'Inhibit Billing By Mail' (No).

**TIP** – The Family Registration form has three sections which display on top of the left side margin: Family Registration, Family Members, and UMDAP Information.

### Family Registration -

**Family Name** – LastName,FirstName (with no space between Last and First name).

**Family's Address** –Street address including apartment or suite #.

**Family's ZipCode** –9-digit zip code with a dash "-"; if +4 digit is unknown, 4-0's is acceptable.

**Family's City** – Populates, if zip is entered.




**Family's State** – Populates, if zip is entered.

**Family Activation Date** – The date the family became active for the start of UMDAP coverage.

**Inhibit Billing By Mail** – Select **"Yes"** to prevent sending a self-pay bill or patient statement to a client. Otherwise, select **"No"**.

The screenshot shows the 'Family Members' section. It features a table with columns 'Client ID #' and 'Family Member Name'. The table lists two members: SMITH,CAPTAIN (578) and WAYNE,BRUCE (238). To the right of the table are buttons for 'Add New Item', 'Edit Selected Item', and 'Delete Selected Item'. Below the table are fields for 'Client ID#' (WAYNE,BRUCE (238)), 'Relationship To 'Head Of Household'' (Self), 'Start Date Of Family Membership' (04/29/2015), and 'End Date Of Family Membership'. At the bottom, there are radio buttons for 'Type Of Family Member': Head Of Household (selected), Family Member (In Household), Family Member (Out of Household), and Extended Family Member.

### Family Members –

1. **Family Membership Information** - Click on  to **link** the **Client ID#**.
2. **Client ID** - Usually begins with a "9". Click on the  button to activate search.
3. **Family Member Name** - The Family LastName,FirstName gets populated in this field.
4. **Type of Family Member** - Select appropriate radio button. Click the lightbulb  icon for Help.
5. **Relationship To 'Head of Household'** - Select the appropriate "Relationship..." from the dropdown list. (E.g., Head Of Household "Relationship..." is *Self*.)
6. **Start Date Of Family Membership** – The same month and day the family was activated, the Avatar system will not allow you to enter a different month and day, except only the year.

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7. **End Date of Family Membership** – **SKIP** unless the client has ended membership to this household (*such as in the cases of death, divorce, or becoming a member of a different client household*).

The screenshot shows the 'UMDAP Information' section of a software interface. On the left, there is a navigation menu with 'Family Registration', 'Family Members', and 'UMDAP Information' (selected). Below the menu are icons for home, print, refresh, delete, and star. The main area contains a table with the following data:

Start Date Of UMDAP Year	End Date Of UMDAP Year	Calculated UMDAP Annual Liability	UMDAP Annual Liability
02/01/2010	01/31/2011	37.00	37
02/01/2011	01/31/2012	37.00	37.00

Below the table are buttons for 'Add New Item', 'Edit Selected Item', and 'Delete Selected Item'. The 'Add New Item' button is highlighted with a red box. Below the table is a section for 'Default UMDAP Information From Most Recent Entry' with input fields for 'Start Date Of UMDAP Year' (02/01/2011) and 'End Date Of UMDAP Year' (01/31/2012). The 'Start Date Of UMDAP Year' field is circled in red. Below this is the 'Financial Liability' section with input fields for 'Gross Monthly Inc Resp Person' (500.00), 'Gross Monthly Inc Spouse' (0.00), 'Gross Monthly Inc Other' (0.00), and '# Dependent On Income' (1). Below that is the 'Asset Determination' section with input fields for 'Saving', 'Bank Balances', 'Market Value Of Stocks', 'Market Value Of Bonds', 'Market Value Of Mutual Savings', and 'Market Value Of Other'. At the bottom of the asset section are 'Total Of Liquid Assets' (0.00), 'Asset Allowance From UMDAP Schedule' (2000.00), and 'Total Net Liquid Assets' (0.00). An error message box is overlaid on the bottom right, stating: 'Error: Start Date Must Be The Same Month And Date of Family Activation Date (10/06/2008)'. The error box is highlighted with a red box.

**UMDAP Information** – This section has 4 subsections to calculate a household’s yearly payment:

- 1) Financial Liability Subsection
- 2) Asset Determination Subsection
- 3) Allowable Expenses Subsection
- 4) Totals Subsection

If no line item is added or displayed in the summary table, click Add New Item button to add a new yearly UMDAP/Payer Financial Information (PFI). **NOTE**, *the client is considered a 'Payer' here.*

**Start Date Of UMDAP Year** – Two-digit month, two-digit date, and four-digit year (MM/DD/YYYY) matching the same month and day as the Family Activation Date. Otherwise, an Error window will pop up. The End Date will be populated by the system.

**1. Financial Liability** – This subsection begins with monthly income fields.



- The “Gross monthly...” wages, Social Security OASDI, SSI or SSP, etc. received by each family member. “Resp Person” = responsible person or Head of Household. If applicable, income for “Spouse” and/or “Other” family members.
- # Dependent On Income – Enter family household number (*count all persons, including non-clients, in household*).

**2. Asset Determination** - This subsection is about liquid assets (quickly convertible to cash).

**\*\* NOTE** the data in the grayed fields are system populated. They are not editable fields. **\*\***

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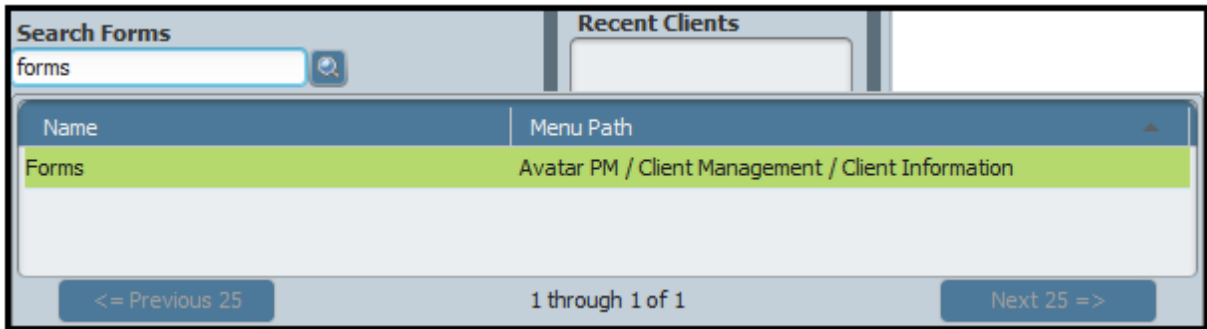
3. **Allowable Expenses** - This subsection is about court-ordered, healthcare, or other expenses. Enter data where applicable, in the white-fill fields.  
**\*\* DO NOT enter data in the "Allowed Monthly Medical Expenses" field. \*\***
4. **Totals** - This subsection summarizes financial data from the preceding subsections: Liability, Assets, and Expenses.
  - a) **"Calculated UMDAP Annual Liability"** – **SKIP**; this field shows a lump sum which is not editable, but adjustments can be made in the following fields...
  - b) **"UMDAP Annual Liability"** - edit to a lesser amount, if needed, which prompts you to the next field "Agreed Monthly Payments..." Then the 2 formerly inactive gray-filled fields, "Adjusted by" and "Reason", must be entered. (For example, a reason could be *Therapeutic Adjustment*.)
  - c) "Agreed Monthly Payments To Satisfy Above Liability" must be entered with installments for the remainder of that UMDAP year.
  - d) **"Approved by"** (clinic/program director's name), **"Interviewer," "Approved Date,"** & **"Date Interviewed"** fields must be completed.


Click  button to save your input. Otherwise, click  to **Exit**, which would allow you to disregard your data input or changes. Select **"Yes"** to close the small window display.

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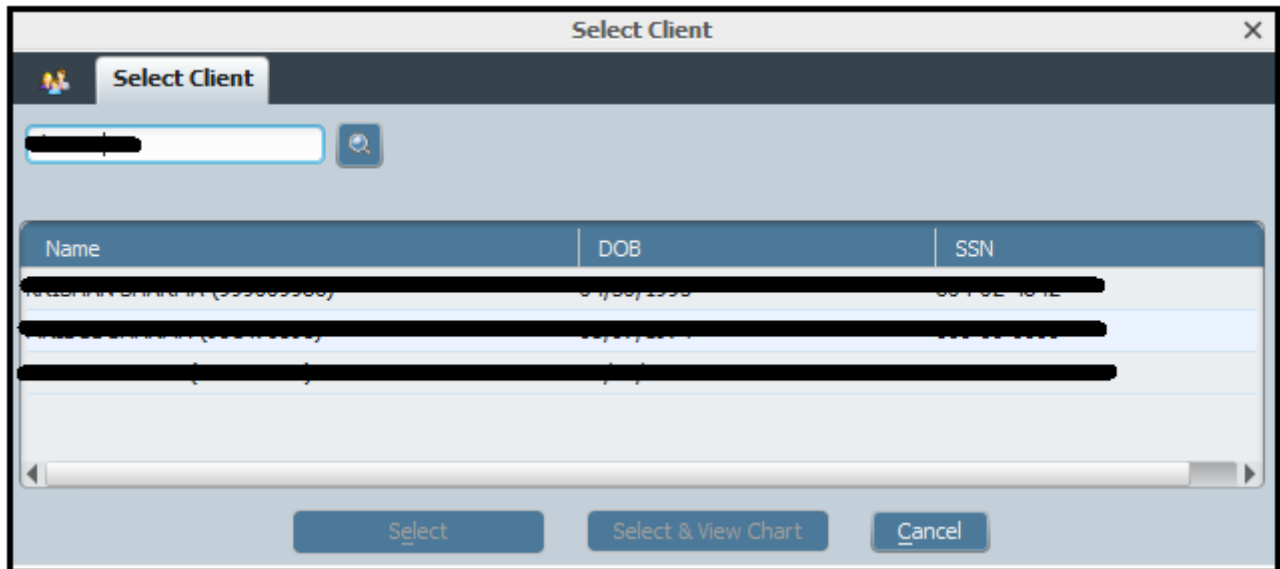
### Find an existing Family Account #:

Go to “**Search Forms**” field, type “**forms**” and press Enter. Select the client from the dropdown list and double-click it.



Enter **LastName,First Name** (for example, “LADY,GAGA” with no space between Last and First name). Click on the  button to activate search. The dropdown list will display Family Accounts meeting the search criteria.

Select the correct Family Account by double clicking on the name or by using the arrow keys to move to the desired account and press ‘Enter’ or click “Select” button.



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Select **"Edit"** to view the existing Family Account # or click **"Add"** to print a new PFI report. It will take you to **"Consent Forms"** option.

Date	Data Entry By (Login)	Data Entry Date	Data Entry Time
08/12/2010	Susan Mose	10/12/2012	12:59 PM

Click on the  button. It will generate a PFI Report on the screen, where you will see Family Account # on the top left hand corner.

<b>Client Name (#)</b> [REDACTED]	<b>Client Address</b> [REDACTED] San Francisco, CA 94121-0000
<b>Account #</b> [REDACTED]	
<b>UMDAP PERIOD: Start of Period</b> 08/01/2011 <b>TO End of Period</b> 07/31/2012	
<b>Family Member Name</b> [REDACTED]	<b>Type</b> Head Of Household
<b>Responsible Party / Family Name</b> [REDACTED]	<b>Relationship to Client</b> Self

Click  when the **"Download Report from server"** window display appears on the screen.  
Click  button to **"Exit"** and select **"Yes"** to close the small window display.

**Consent Forms**

**Date** 10/09/2012

**Consent Forms**

- CBHS Consent for Treatment
- CBHS Disclosure of PHI
- CBHS Notice of Privacy Practices
- CBHS Receipt of Materials
- Consent Medication Adult
- Consent Medication CYF

**TIP** – The Consent Forms will display the various types of consent forms in use in the system and allow the user to printout each from the check boxes listed below.

- CBHS Consent for Treatment
- CBHS disclosure of PHI
- CBHS Notice of Privacy Practices
- CBHS Receipt of Materials
- Consent Medications Adult
- Consent medication CYF

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### Family Registration, UMDAP/PFI

There are two different aspects of **Payer Financial Information (PFI)** in regard to storing financial information in My Avatar system:

1. **Payer** Financial Information is stored in **Financial Eligibility** screen.
2. **Patient** Financial Information is stored in **Family Registration** screen.

<b>Medi-Cal Full Scope #88</b>	<b>Medi-Cal with SOC #32</b>
<p><b>Financial Eligibility:</b> <span style="float: right;"><b>Yes</b></span>                      Must enter Payer’s Financial Information in Financial Eligibility screen, i.e. add guarantors or insurance info. Make a note of guarantor order.  <b>1. Medi-Cal Full Scope #88</b>  <b>2. General Fund #35</b></p>	<p><b>Financial Eligibility:</b> <span style="float: right;"><b>Yes</b></span>                      Must enter Payer’s Financial Information in Financial Eligibility screen, i.e. add guarantors or insurance info. Make a note of guarantor order.  <b>1. Medi-Cal SOC #32</b>  <b>2. UMDAP #36</b>  <b>3. General Fund #35</b></p>
<p><b>Family Registration:</b> <span style="float: right;"><b>No</b></span>                      A Family Account should not be added in Family Registration screen, since a Full Scope beneficiary does not have any patient liability.</p>	<p><b>Family Registration:</b> <span style="float: right;"><b>Yes</b></span>                      A Family Account needs to be added in Family Registration screen, because the beneficiary is eligible for UMDAP. That means, a client is responsible for a certain portion of financial liability.</p>
<p><b>Consent Forms:</b> <span style="float: right;"><b>Yes</b></span>                      Go to Forms. Select the first top three options (Consent for Treatment, Disclosure of PHI and Notice of Privacy Practices) and click the <b>‘Click Here for PFI Report’</b> button below to printout and obtain signature from the Client or Client’s Responsible Party for PHI etc.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Consent Forms</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> CBHS Consent for Treatment</li> <li><input type="checkbox"/> CBHS Disclosure of PHI</li> <li><input type="checkbox"/> CBHS Notice of Privacy Practices</li> <li><input type="checkbox"/> CBHS Receipt of Materials</li> <li><input type="checkbox"/> Consent Medication Adult</li> <li><input type="checkbox"/> Consent Medication CYF</li> </ul> <p style="text-align: center; margin-top: 10px;"><a href="#">Click Here for PFI Report</a></p> </div>	<p><b>Consent Forms:</b> <span style="float: right;"><b>Yes</b></span>                      Go to Forms. Click the <b>‘Submit’</b> button to printout and obtain signature from the Client or Client’s Responsible Party for their agreement to pay yearly financial UMDAP liability amount due.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Consent Forms</b></p> <p style="text-align: right;">Date 08/12/2010</p> <p style="text-align: center; margin: 10px 0;"><a href="#">Submit</a></p> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <span>📄</span> <span>🖨️</span> <span>📁</span> </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <span>❌</span> <span>🌐</span> <span>★</span> </div> </div>

**NOTE:** Clients with Healthy Kid (HK), Healthy Families (HF) and Healthy Worker (HW) beneficiaries do not need to fill out Family Registration. These beneficiaries have their co-pays per visit. Their Payer Financial Information is entered in Financial Eligibility section. They should use Full Pay #39 as the secondary guarantor, before General Fund #35.

# **My Avatar – Family Registration Guide**

*Technical Writer: Allyn-Frances Quan*