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

1. **New Client is admitted to a CBHS Program for treatment services**

2. **The Avatar Admissions Bundle includes the eGuarantor form and CSI (MH) or CalOMS (SA) Admissions dataset. Clients’ CSI or CalOMS annual Periodic reporting date will be the same as their Annual PFI anniversary date.**

3. **Intake Users enter Client’s guarantor info for their Episode in the eGuarantor form in Avatar CalPM**

4. **CBHS Billing generates a daily report listing eGuarantor forms completed by Providers; verifies eligibility and coverage info; creates the Client’s FE record under the Provider RU Episode.**

5. **Financial Eligibility Report is available for Providers to review Clients’ FE records entered by Billing.**

**NOTE:** Except for SFHP, Insured Clients are referred to their HMO or OHC Insurance. Insured Clients may be admitted to a CBHS program if their insurance authorizes and agrees to pay for services or there is written documentation their insurance does not cover the services; and, with approval of the CBHS Age Director.

- **Per CBHS policy, Clients’ initial and annual PFI requirements are tied to their initial and annual periodic CSI or CalOMS reporting date.**
- **Providers may use the Episode Guarantor Information form to gather Client’s PFI information for data entry into the e-Guarantor form in Avatar. The UMDAP Financial Assessment and Billing Consent forms are signed by the Client and are printed on 2-part NCR paper. The top, original copy of these forms is given to the Client and, the bottom copy is retained by the Clinic. The Clients’ signature authorization and consent are then indicated on the e-Guarantor screen in Avatar (menu path: CalPM/ Episode Guarantor Information).**

**SA Providers DO NOT USE Avatar Family Registration**

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