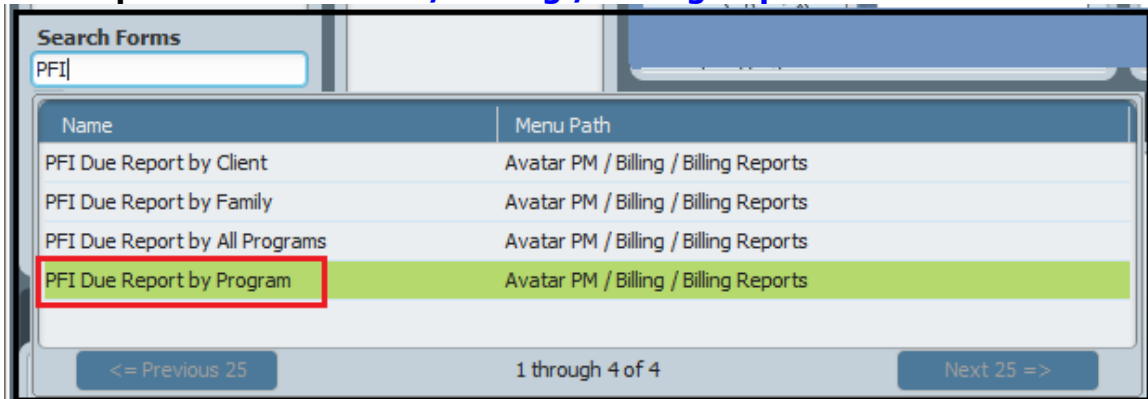


## PFI Due Report

The main purpose of this report is to have a mechanism to know ahead of time, whose UMDAP periods are due and need to be updated, for their upcoming visits. Hence, you are advised to run this report every Friday or Monday on a weekly basis, and give a printout to respective clinicians to use it as a reference point. Optimal use of this report will enhance your Reporting Unit's ability to remain up to date for each client's financial eligibility information.

Go to **Search Forms** field, type "PFI" and press Enter. A dropdown list will display a list of matching Menu Path. Select **"PFI Due Report by Program"** from the dropdown list and double-click it.

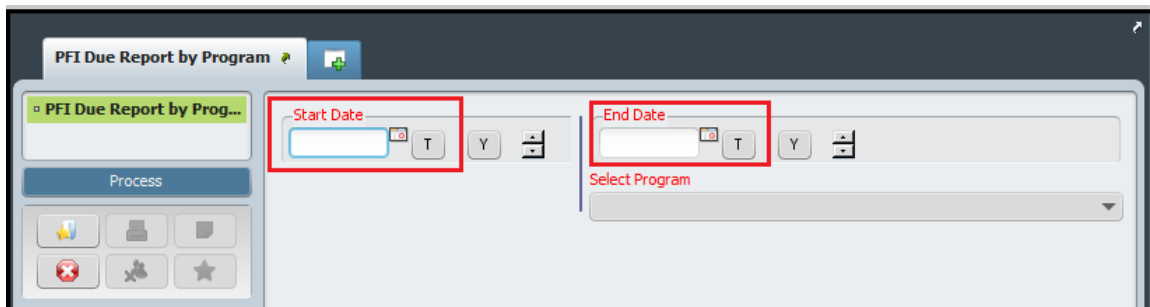
**Menu path:** → Avatar PM / Billing / Billing Reports



Name	Menu Path
PFI Due Report by Client	Avatar PM / Billing / Billing Reports
PFI Due Report by Family	Avatar PM / Billing / Billing Reports
PFI Due Report by All Programs	Avatar PM / Billing / Billing Reports
<b>PFI Due Report by Program</b>	Avatar PM / Billing / Billing Reports

### PFI Due Report by Program:

Enter **"Start Date"** and **"End Date"**.  
Select a **Program** from the dropdown list.  
Click **"Process"** button on the left.



PFI Due Report by Program

PFI Due Report by Prog...

Process

Start Date

End Date

Select Program

***TIP:** This report may take 15-20 minutes or more.*

## PFI Due Report

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Clients Name	PATID	Family ID	Guarantor #	EPI #	Umdap Exp Date	Days
[REDACTED]	[REDACTED]	[REDACTED]	14	3	05/21/2012	-1
[REDACTED]	[REDACTED]	[REDACTED]	35	3	05/21/2012	-1
[REDACTED]	[REDACTED]	[REDACTED]	14	8	05/21/2012	-1
[REDACTED]	[REDACTED]	[REDACTED]	35	8	05/21/2012	-1
[REDACTED]	[REDACTED]	[REDACTED]	36	8	05/21/2012	-1
[REDACTED]	[REDACTED]	[REDACTED]	14	1	05/23/2012	1
[REDACTED]	[REDACTED]	[REDACTED]	35	1	05/23/2012	1
[REDACTED]	[REDACTED]	[REDACTED]	36	1	05/23/2012	1
[REDACTED]	[REDACTED]	[REDACTED]	88	1	05/23/2012	1
[REDACTED]	[REDACTED]	[REDACTED]	35	2	05/24/2012	2
[REDACTED]	[REDACTED]	[REDACTED]	36	2	05/24/2012	2
[REDACTED]	[REDACTED]	[REDACTED]	35	1	05/25/2012	3
[REDACTED]	[REDACTED]	[REDACTED]	36	1	05/25/2012	3
[REDACTED]	[REDACTED]	[REDACTED]	106	4	05/25/2012	3
[REDACTED]	[REDACTED]	[REDACTED]	22	4	05/25/2012	3
[REDACTED]	[REDACTED]	[REDACTED]	35	4	05/25/2012	3

**Note:**

PFI Due Report by Program - Notify Programs about Active Clients whose UMDAP Periods will be expiring:  
Client Name, Client PATID, Family Registration Account Number, UMDAP Expiration Date

Please note the report on the screen shot above was run with a '**Start Date**' of **05/21/2012** and '**End Date**' of **05/25/2012**. The negative number of days (with a minus sign) on the last column labeled '**Days**' indicate how many days the UMDAP period has been expired, or vice versa i.e. yet to be expired (with a plus sign). The second last column indicates the 'UMDAP Expiration Date'. If you enter a future date in Start Date field, it will give you how many days are left for UMDAP period to be expired.

Once the new UMDAP periods are added or updated in Family Registration, that specific client eligibility record will have a new UMDAP Expiration Date. The negative number of days would change into positive number of days. A client, whose UMDAP is updated will not appear on this report, until one calendar year has passed. For example, the updated client record will not display on the next weekly run, until next year in May 2013.

The middle column labeled '**Guarantor #**' indicates what kind of insurance info a client has and if the guarantor info is entered correctly. Please note, after adding UMDAP info in Family Registration, you are required to add UMDAP guarantor #36 in Financial Eligibility section.

The report lists all UMDAP clients, whether the episodes are closed or in open status. If episodes are closed, then the UMDAP info should be updated by contacting the client, or when they return to receive their mental health services in the future.