San Mateo County Mental Health Services

Roles and Responsibilities for Client Information and Financial Screening

Role	Responsibility
Client	– Supplies information and documentation of financial status. – Pursues eligibility for Medi-Cal and other entitlements. – Alerts MH to changes in financial and insurance status. – Provides payment.
Administrative Staff at Access Team and in Units	– Collects information from client. – Advises client what information to bring to first appointment. – Applies financial participation policy at first contact and annually to establish financial obligation. Puts hard copy in the client's chart. Sends copy of Financial assessment/assignment, UMDAP, and card to MIS. – Evaluates possible entitlement options and refers to Medi-Cal, Healthy Families, other. – Makes appointments for clients with Medi-Cal. – Collects fees on-site but does not adjudicate disagreements about fees or refusals to pay. – Flags charts of clients that need client fee re-assessment/annual renewal and leaves note in client chart for clinician re. follow-up matters and need to remind client to make appointment. – Receives monthly report on delinquent accounts and copies to Unit Chief. – Follows-up with Billing Supervisor on specific billing issues. – Initiates fee adjustments if appropriate and refers clients back to clinician for fee adjustment/related issues per policy.
Clinician/Care Coordinator	– Knows the client's financial obligation—keeps abreast of financial documentation in the chart. – Considers requests for therapeutic adjustment if necessary, using guidelines. – Follows-up in consultation with Unit Chief regarding uncollected liability, decision to send to Collections, decision to adjust liability. – Communicates information learned in course of treatment about client's change in financial status or change of insurance to administrative staff for follow-up. – Encourages clients to pursue entitlements especially if they repeatedly miss eligibility appointments. – May need to collect information needed for financial assessment process and transmit to administrative staff in cases where clients are homebound or otherwise unable to attend clinic appointments with administrative staff.

Role	Responsibility
Administrative Staff Supervisor	– Supervises administrative staff. – Trains new administrative staff in their roles. – Promulgates policy/procedure. – Monitors Medi-Cal and patient fee reports and flags problems for follow-up by staff and clinical and administrative managers. – Monitors implementation of new policy and suggests improvements. Updates unit chiefs/managers monthly during the early implementation. – Monitors actual fee collection procedure on-site at clinics and suggests improvements. – Informs managers of any areas of critical difference in the application of the policy across the system.
Unit Chief/Program Specialist	– Trains new clinical staff in their role re. client financial participation. – Disseminates policy/procedure to staff and reviews periodically. – Reviews delinquent account reports with clinicians (including MDs who are primary clinician) and determines whether to discuss w/client-encourage to pay, send to collections, discuss adjustment w/client. – Follow-up with documentation of decision to MIS. – Assure uniformity of this process across clinical staff and clients. – Monitor monthly Medi-Cal and patient fee reports and participate in problem-solving problems revealed by those reports—suggest improvements. – Resolve complaints/grievances resulting from client financial participation issues.
Billing Staff	– Enter fee adjustments and return copy to unit administrative staff.
Billing Supervisor	– Produces client bills. – Attempts to resolve billing issues that do not require referral back to unit. – Walks clients through billing statement if necessary. – Refers clients if needed back to unit administrative staff.
Billing and Business Systems Mgr	– Supervise Billing Mgr. – Supervise information systems staff and information systems processes. – Trouble-shoot actual billing info tech problems.
Adult/Child Managers and Deputy Directors	– Promulgate policy/procedure and monitor units progress in implementation. – Review periodically in supervision and staff meetings. – Resolve complaints/grievances. – Monitor implementation of changes in policy and procedure and suggest improvements.

Role	Responsibility
Finance and Operations Directors	– Track state/federal requirements and revise policy/procedure as necessary to comply. – Monitor implementation of changes in policy and procedure and make changes/improvements. – Review reports on progress in collections and revenues and disseminate status to others.
Consumer Relations Coordinator	– Respond to initial complaints regarding patient financial obligation and coordinate with others.
Mental Health Director	– Disseminates/promotes clarity about the vision and parameters for access to services including client financial participation. – Responds to County Manager and Board of Supervisors, other county agency concerns re implementation of client financial participation policies.