



Family Registration (UMDAP)

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Family Registration (UMDAP)

In this lesson you will register a Self Pay client as a family and you will learn which family members should be registered as a part of the family.

You will enter the Uniform Method of Determining Ability to Pay (UMDAP) information, and print the UMDAP report for the client's signature. You will also learn the process to follow if the client cannot afford the payment amount and needs a therapeutic adjustment.

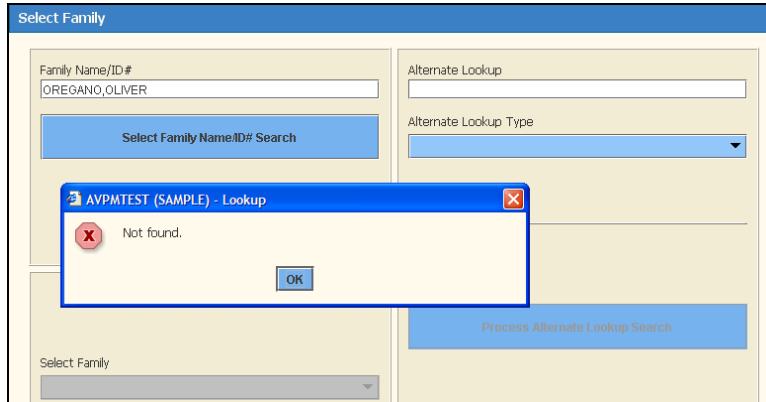
Lesson Objectives

- State the purpose of Family Registration
- Explain who you should register and why
- Use the Select Family screen to determine if the family is registered in Avatar
- State the purpose of the UMDAP
- Print the UMDAP report
- Explain the process if a payment adjustment is needed

LESSON SCENARIO

Mukesh Gupta is an administrator at a BHRS clinic. He just entered the Financial Eligibility information for a client, and he is now ready to complete the Family Registration and UMDAP information.

The first step Mukesh takes is to verify that the client is not already registered as a family. Using the Select Family screen, Mukesh enters the client name and Avatar reports that the family is not found in the system.



Mukesh then enters the client's financial liabilities, assets, and expenses, and Avatar calculates the payment due from the client. Mukesh prints the UMDAP report, showing the client's monthly obligation. The client signs the report and Mukesh scans it into Avatar as part of the client's electronic record.

PAYMENT CONTRACT

The state requires that we charge you for mental health services based upon your ability to pay. Based on family income and number of people in the family, a fee is set. This fee may be adjusted if your financial situation changes. You will be notified in writing 30 days in advance if the fee for your services is changed.

Based on the fee determined by the above process, I agree to a payment plan as follows. I understand that I will make payments as stated below regardless of any insurance coverage I might have. I further understand that I will receive a refund if my payments and the insurance company payments exceed the cost of the service. I understand that by signing this statement, I am declaring under penalty of perjury under the laws of the State of California that the information I have given is true and correct. If the information is found to be incorrect and/or false, I understand that I will be billed for all services previously provided.

Not to exceed **\$5.00** per month.

Date

Signature of patient or guarantor

Date

Signature of Mental Health Representative

UNDERSTANDING FAMILY REGISTRATION

You use the Family Registration window to register a Self Pay client as a Family in Avatar. Family Registration is also where you record the Uniform Methods of Determining Ability to Pay (UMDAP) information, which is the State sliding fee schedule for client billing.

NOTE: It is recommended that you complete Financial Eligibility prior to Family Registration. It is during the Financial Eligibility interview that you discover if the client is Self Pay.

UMDAP is discussed in further detail in “Understanding the UMDAP Process,” which appears on page 10 in this lesson.

WHO SHOULD YOU REGISTER AS A FAMILY?

You should only register BHRS clients as family members.

- If there are multiple clients who receive services and one party is financially responsible for them, those clients should all be registered as family members under the same family registration. An example is a parent with two or more dependent children who receive services.
- Two adult siblings who are financially responsible for themselves should not be registered in the same family.
- A single client can be a family.

Avatar takes into account the number of clients a person is financially responsible for when calculating the monthly payment during the UMDAP process.

The Family Name is the name of the first family member to receive BHRS services. Other family members who subsequently receive BHRS services should be registered under the family name of the first family member to enter the BHRS system.

NOTE: The last names of other client family members may be different from the name of the original client entered as a family.

WHO CAN PERFORM THIS FUNCTION?

Administrators perform this function.

MENU PATH

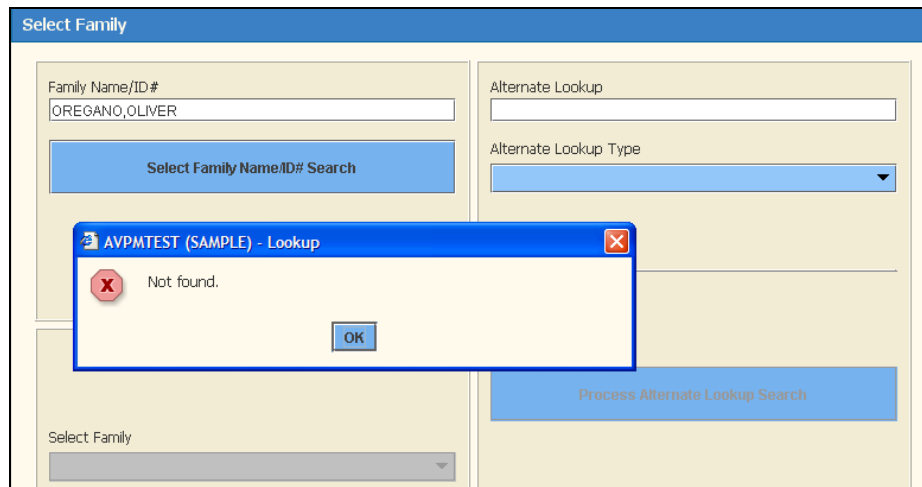
Avatar PM→Client Management→Family and UMDAP Management→Family Registration

SELECT FAMILY SCREEN

The Select Family screen is the first screen that appears when you choose the Family Registration command. You use this screen to determine if the client was previously registered as a family in Avatar.

If there are multiple family members in the BHRS system who have the same person financially responsible for them, they will be listed as members of the same family under the name of the first person to enter the BHRS system.

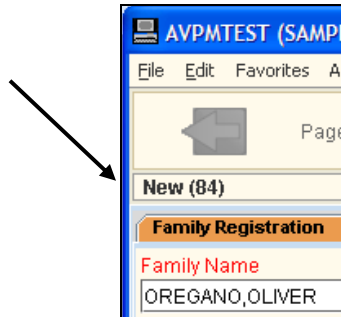
In the following example, the Not Found message indicates that the *family* is not registered in Avatar.



Field	Description
Family Name/ ID #	<p>Enter the family name or ID #. Enter the family name in the following format:</p> <p style="text-align: center;">LASTNAME,FIRSTNAME</p> <p>This ID # is not the same as the MR # (Client ID); it is the Family ID. In Avatar you register the client as a family to obtain a Family ID #. Once the family is registered, you can select the family using the Family ID #.</p> <p>If a Family ID # already exists but you do not know the number, you can locate it on the client's face sheet in the Family Number field in the upper-left corner of the sheet.</p>
Alternate Lookup	BHRS does not use this feature.

ENTERING A NEW FAMILY IN THE SYSTEM

If Avatar cannot locate the family name, when you begin the registration process, Avatar automatically assigns a Family ID #, as shown in the following figure.



FAMILY REGISTRATION TAB

Use this tab to enter the address information for billing purposes.

Field	Description
A) Family's Address – Street Family Address – Street 2	These fields should contain the <i>billing address</i> of the financially responsible person. If the person responsible for paying BHRS bills is not the client, enter the responsible person's name in a Street field as shown here: C/O OLIVIA OREGANO, 123 CHERRY BLOSSOM LANE If the address does not fit in the first address field, use the Street 2 field.
B) Family Activation Date	This is the date the UMDAP takes effect (Start Date of UMDAP Year). For example, if a client is admitted January 1 st but the UMDAP does not occur until March 15 th , the Family Activation Date is March 1 st .
C) Inhibit Billing by Mail	MIS use ONLY.



Exercise 1: Complete the Family Registration Tab

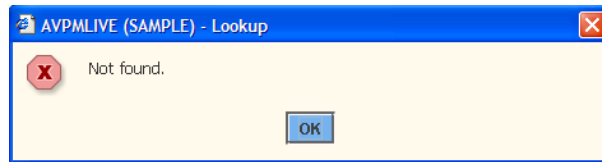
In this exercise you will enter the family registration information for the client you admitted in the admission bundle exercise. In this example, your client will be financially responsible for him/herself.

1. Choose Avatar PM→Client Management→Family and UMDAP Management→Family Registration from the Menu Frame.

The Select Family screen appears.

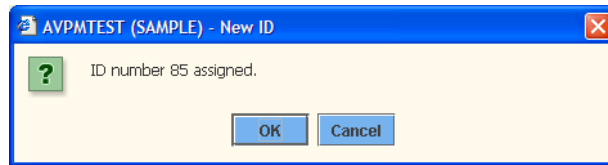
2. Enter the client's name in this format: LASTNAME,FIRSTNAME
3. Click the Select Family Name/ID# Search button.

A Not Found message appears.



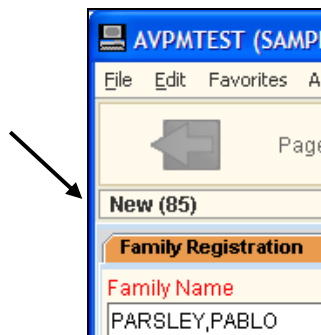
4. Click OK.
5. Click the New button in bottom-right corner of Select Family screen.

The New ID message appears.



6. Click OK to accept the new ID.

Note the New (85) entry. This is the Family ID #, which is different from the client's MR # (Client ID).



7. Follow these steps to complete the Family Registration tab:

A Enter the family billing address here.

AVPMTEST (SAMPLE) - PABLO PARSLEY (0000000085)/Family Registration

File Edit Favorites Avatar PM Help

Page 1 of 1

PARSLEY,PABLO (0000000085)

Family Registration Family Members UMDAP Information

Family Name
PARSLEY,PABLO

Family's Address - Street
123 CHERRY BLOSSOM LANE APT 2

Family's Address - Street 2

Family's Address - Zipcode
94403

Family's Address - City
SAN MATEO

Family's Address - State
CALIFORNIA

Family Activation Date
08/01/2009

Inhibit Billing By Mail (MIS use ONLY!)
 Yes No

B Enter the zipcode shown here.

C The city and state autofill based on the zipcode.

D Enter the Family Activation Date (the first day of the month in which the UMDAP occurs) here.

Leave this window open for the next exercise.



FAMILY MEMBERS TAB

Use the Family Membership Information table for the following purposes:

- To register the *first* BHRS client within a family as a family. The client's name (LASTNAME,FIRSTNAME format) is the Family Name.
- To register *additional* family members, who enter the BHRS system after the first family member, and who have the same person as the financially responsible party.

NOTE: You enter *other family members and other relationships* in the BHRS Client Relationships window. You also re-enter the people you list in Family Registration in BHRS Client Relationships. BHRS Client Relationships provides a way to list *all* client relationships in one place. See the "Entering BHRS Client Relationships" lesson.)

The screenshot shows a web application window titled "AVPMCONV (LIVE) - NEW Family (000000015)/Family Registration". The main content area is divided into several sections:

- Section A:** A table titled "Family Membership Information" with columns "Client ID#" and "Family Member Name". It contains one row: "OREGANO, OLIVER (930028)" and "OREGANO, OLIVER". To the right of the table are buttons for "Add New Item", "Edit Selected Item", and "Delete Selected Item".
- Section B:** Search fields including "Client ID#" (containing "OREGANO"), "Process Search", and a list of search criteria: Name/ID Number (selected), Social Security Number, Facility Chart Number, Alias, Unique Client ID, Soundex, and Claim Number. A dropdown menu shows "OREGANO, OLIVER (930028)".
- Section C:** "Type Of Family Member" radio buttons: Head Of Household, Family Member (In Household) (selected), Family Member (Out of Household), and Extended Family Member.
- Section D:** "Relationship To 'Head Of Household'" dropdown menu.
- Section E:** "Start Date Of Family Membership" field (02/01/2010) and "End Date Of Family Membership" field.

Field	Description
A) Family Membership Information	Enter the client's name in the table. Use the Client ID# Process Search field to enter the client in the table.
B) Client ID#	Enter either the client's name (use LASTNAME,FIRSTNAME format) or the client's MR # (Client ID).
C) Type of Family Member	BHRS does not use the Extended Family Member option.
D) Start Date of Family Membership	For the first family member who enters the BHRS system, this is the same date as the Family Activation Date (Family Registration tab). For subsequent family members it is the date the episode is opened.
E) End Date of Family Membership	Enter the last date of the member's association with the family.



Exercise 2: Enter Information in the Family Members Tab

In this exercise you will enter your client in the Family Members tab.

Before You Begin: The Family Registration window should be open from the last exercise.

ENTER THE CLIENT AS A FAMILY MEMBER

1. Click the Family Members tab.
2. Click the Add New Item button on the right side of the window.
3. Enter your client's name in the Client ID# field using this format: LASTNAME,FIRSTNAME.
4. Click the Process Search button.
5. If there are other client's with the same last name, choose your client from the dropdown list.
6. Follow these steps to continue adding information about your client:

A Choose this option.

B Choose Son from this dropdown list.

C Enter the family membership date here. **NOTE:** For the first family member who enters the BHRS system, it is the same as the Family Activation Date.

The screenshot shows the 'Family Registration' window with the 'Family Members' tab active. A table displays the following information:

Client ID#	Family Member Name
PARSLEY,PABLO (930099)	PARSLEY,PABLO

Below the table, the 'Client ID#' field contains 'PARSLEY,PABLO'. The 'Type Of Family Member' section has 'Family Member (In Household)' selected. The 'Relationship To 'Head Of Household'' dropdown is set to 'Son'. The 'Start Date Of Family Membership' is '08/01/2010'. The 'End Date Of Family Membership' is empty.

Leave this window open for the next exercise.



UNDERSTANDING THE UMDAP PROCESS

Uniform Methods of Determining Ability to Pay (UMDAP) is the process that determines a client's/family's ability to pay for County services. It is the State sliding fee schedule for client billing, and it only applies the amount that the client is requested to pay.

You might complete the UMDAP when the client first enters the system or you might complete it at a later date. For example, a client may enter the BHRS system on January 1st, but the UMDAP is not completed until March 15th. The start of the UMDAP year is the first day of the month in which the UMDAP occurs—in this example, March 1st.

NOTE: You should only enter Family Registration information when you are ready to complete the UMDAP, because you cannot submit the data in Avatar without the UMDAP information.

WHEN DO YOU COMPLETE THE UMDAP?

You complete an UMDAP when a client first enters the BHRS system. Following the initial UMDAP, you review a client's/family's UMDAP information annually.

WHAT IF THE CLIENT'S ABILITY TO PAY CHANGES PRIOR TO THE ANNUAL UMDAP?

If the client's ability to pay changes prior to the annual UMDAP, you cannot currently change the End Date of UMDAP Year field. Refer these situations to MIS.

SCAN THE UMDAP DOCUMENTS

When the UMDAP is complete, scan the supporting documents such as a client's driver's license and pay stub into Avatar. You also print the UMDAP report, which includes the client's monthly fee. Have the client sign the report and then scan the signed document into the system. You scan these types of documents into Avatar to maintain a complete client record. (See the "Scanning and Viewing Documents" lesson.)

WHAT IF A PAYMENT ADJUSTMENT IS NEEDED?

If the client/family cannot pay the amount that appears in the UMDAP report, the client should take the UMDAP report to the clinician for a therapeutic adjustment. MIS then handles all necessary changes and notifies the administrator who will print a new UMDAP report for the client to sign and then scan it into the system.

UMDAP INFORMATION TAB PAGE 1

Use this tab to begin the UMDAP and gather Financial Liability information.

The screenshot displays the 'UMDAP Information' tab for Oliver Oregon (0000000015). It features 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	226.00	226.00

Below the table are buttons for 'Add New Item', 'Edit Selected Item', and 'Delete Selected Item'. A red letter 'A' points to the 'Add New Item' button. Below this is a section for 'Default UMDAP Information From Most Recent Entry' with input fields for 'Start Date Of UMDAP Year' (02/01/2010) and 'End Date Of UMDAP Year' (01/31/2011). A red letter 'B' points to the 'Start Date' field, and a red letter 'C' points to the 'End Date' field. At the bottom is a 'Financial Liability' section with input fields for 'Gross Monthly Inc Resp Person' (2000.00), 'Gross Monthly Inc Spouse' (0.00), 'Gross Monthly Inc Other' (0.00), and '# Dependent On Income' (1).

Field	Description
A) UMDAP Information	Click the Add New Item button to start a new row in the UMDAP Information table then complete all fields on the five UMDAP pages.
B) Start Date of UMDAP Year	This is the first day of the month in which the UMDAP occurs. If the UMDAP occurs on March 15 th the Start Date of the UMDAP Year is March 1 st . This is the same date as the Family Activation Date (Family Registration tab).
C) End Date of the UMDAP Year	This field autofills with a date one year from the Start Date of the UMDAP Year.

UMDAP INFORMATION TAB PAGE 2

Use this page to gather the Asset Determination information.

Asset Determination	
Saving	500.00
Bank Balances	0.00
Market Value Of Stocks	0.00
Market Value Of Bonds	0.00
Market Value Of Mutual Savings	0.00
Market Value Of Other	0.00
Total Of Liquid Assets	500.00
Asset Allowance From UMDAP Schedule	2000.00
Total Net Liquid Assets	0.00

Field	Description
A) Total of Liquid Assets Asset Allowance from UMDAP Schedule Total Net Liquid Assets	These fields auto-calculate based on information you entered previously, and you cannot modify them.

UMDAP INFORMATION TAB PAGE 3

Use this tab to collect the Allowable Expenses information.

Allowable Expenses	
Court Ordered Obligations Paid Monthly	0.00
Monthly Child Care	500.00
Monthly Dependent Support Payments	0.00
Monthly Medical Expense Payments	0.00
Monthly Deductions For Retirement Plans	0.00
Housing Costs	800.00
Housing Adjustment	200

UMDAP INFORMATION TAB PAGE 4

This page displays the totals from the UMDAP information entered on pages 1 – 3.

Totals	
Total (Gross Monthly Income)	2000.00
Total (Monthly Liquid Assets)	0.00
Total (Gross Monthly Income and Monthly Liquid Assets)	2000.00
Total (Allowable Expenses)	700.00
Adjusted Gross Income	1300.00
Calculated UMDAP Annual Liability	226.00
UMDAP Annual Liability	226.00
Agreed Monthly Payments To Satisfy Above Liability	
Adjusted by	
Reason	
Approved by	Date Approved
TANIA THYME	02/26/2010

Field	Description
A) UMDAP Annual Liability (MIS use ONLY)	<p>NOTE: Administrators <i>should not change</i> this amount. It is for MIS use only.</p>
B) Agreed Monthly Payments to Satisfy Above Liability	<p>The monthly payment appears on the UMDAP report. You access the Payor UMDAP window by making the following menu choices: Avatar PM→Reports→Payor UMDAP <choose desired language></p> <p>The administrator should enter the monthly payment that appears on the UMDAP report in this field.</p> <p>NOTE: You must fill in the remaining required (red) fields, submit the Family Registration window, run the UMDAP report, re-open the Family Registration window, enter the monthly payment, complete the remaining entries in the window and then submit the window again.</p> <p>This field is also for therapeutic adjustments, which MIS enters in Avatar. MIS then notifies the administrator of the modification.</p> <p>The administrator then runs the UMDAP report, obtains the client’s signature on the report, and then scans it into Avatar. Alternatively, if a signature pad is available, gather the signatures using the signature pad and then print a copy for the client.</p>
C) Approved By Date Approved	<p>Enter the administrator’s name and the current date. If an adjustment occurs, MIS updates these fields.</p>

UMDAP TAB PAGE 5

Use this page to enter the interviewer's name and the date of the interview.

AVPMCONV (LIVE) - OLIVER OREGANO (000000015)/Family Registration

File Edit Favorites Avatar PM

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OREGANO, OLIVER (000000015)

Family Registration Family Members **UMDAP Information** BHRS Documentation Tracking

A Interviewer: TANIA THYME Date Interviewed: 02/26/2010

Field	Description
A) Interviewer Date Interviewed	Enter the administrator's name and the interview date. These fields will not change if there is an adjustment or when additional interviews occur.

ANNUAL UMDAPS



Annual UMDAPs are treated as new entries in the UMDAP Information table on page 1 of the UMDAP information tab. You click the Add New Item button to start a new row in the table and then enter the information for the annual UMDAP.

AVPMCONV (LIVE) - OLIVER OREGANO (000000015)/Family Registration

File Edit Favorites Avatar PM Help

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OREGANO, OLIVER (000000015)

Family Registration Family Members **UMDAP Information** BHRS Documentation Tracking

UMDAP Information

Start Date of UMDAP Year	End Date of UMDAP Year	Calculated UMDAP Annual Liability	UMDAP Annual Liability
02/01/2010	01/31/2011	226.00	226.00

Add New Item Edit Selected Item Delete Selected Item

EDITING UMDAP INFORMATION

Once an UMDAP is submitted, you cannot make editing changes. Any changes should go through MIS.

If the client's ability to pay changes prior to the annual UMDAP, currently you cannot change the End Date of the UMDAP Year field. Refer these situations to MIS.

PRINTING THE UMDAP REPORT

The monthly payment due appears on the UMDAP report. Print the UMDAP report for the client to sign and then scan the signed report into Avatar.

If the client is unable to pay the amount specified in the report, see "What If a Payment Adjustment is Needed?" on page 10.

MENU PATH

Avatar PM → Reports → Payor UMDAP <specify language>

SELECT THE CLIENT WHOSE REPORT YOU WANT TO PRINT

When you choose the Payor UMDAP command, Avatar displays the Select Client screen where you look up the client whose UMDAP report you want to print.

The screenshot shows the Avatar software interface. On the left is a 'Tasks' sidebar with options like 'Select Client', 'My Appointments', 'My To-Do List', etc. The main area is titled 'Select Client'. It features a search box labeled 'Client Name/ID#' with the text 'OREGANO, OLIVER' entered. Below the search box is a blue button labeled 'Select Client Name/ID# Search'. At the bottom of the main area, there is a 'Select Client' dropdown menu showing 'OREGANO, OLIVER (000000452) [Soun... 650-... 11/0... ...' and a table of search results.

Client Name/ID#	Phone	DOB	Gender
OREGANO, OLIVER (0000... 650-555-1212	650-555-1212	11/09/1950	Male
OREGANO, OLIVIA (0000...			Female
OREGANO, OSCAR (P229...			

PROCESSING THE UMDAP REPORT

You use the Payor UMDAP window to access the report for printing. Clicking the Process icon in this window generates the report.



Field	Description
Enter the UMDAP Effective Date	This is the Start Date of the UMDAP Year that appears on the Family Registration tab in the Family Registration window.

You find the payment amount at the bottom of the first page of the report. Ask the client to sign the report. Either the administrator or the clinician signs the Signature of Mental Health Representative. The administrator then scans the report into the system. (See Lesson 10 in the Introduction to Avatar book for details on scanning documents.)

Alternately, if a signature pad is available, use the signature pad to gather signatures and then print a copy of the document for the client.

PAYMENT CONTRACT

The state requires that we charge you for mental health services based upon your ability to pay. Based on family income and number of people in the family, a fee is set. This fee may be adjusted if your financial situation changes. You will be notified in writing 30 days in advance if the fee for your services is changed.

Based on the fee determined by the above process, I agree to a payment plan as follows. I understand that I will make payments as stated below regardless of any insurance coverage I might have. I further understand that I will receive a refund if my payments and the insurance company payments exceed the cost of the service. I understand that by signing this statement, I am declaring under penalty of perjury under the laws of the State of California that the information I have given is true and correct. If the information is found to be incorrect and/or false, I understand that I will be billed for all services previously provided.

Not to exceed **\$5.00** per month.

Date

Signature of patient or guarantor

Date

Signature of Mental Health Representative

If the client cannot pay the amount shown, the client should take the report to the clinician for a therapeutic adjustment. MIS then handles all necessary changes and notifies the administrator who will print out a new UMDAP report for the client's signature.



Exercise 3: Enter UMDAP Information

In this exercise you will enter the UMDAP information to determine the client's ability to pay for County services.

Before You Begin: The Family Registration window should be open from the last exercise.

1. Click the UMDAP Information tab.
2. Follow these steps to enter the client's financial liability:

A Click this button to start a new row in the table.

B Enter the start date here. **NOTE:** This is the first day of the month in which the UMDAP occurs.

Start Date Of UMDAP Year	End Date Of UMDAP Year	Calculated UMDAP Annual Liability	UMDAP Annual Liability
02/01/2010	01/31/2011	368.00	368.00

Default UMDAP Information From Most Recent Entry

Start Date Of UMDAP Year: 02/01/2010 T Y -

End Date Of UMDAP Year: 01/31/2011 T Y -

Financial Liability


Gross Monthly Inc Resp Person: 1500.00

Gross Monthly Inc Spouse: 0.00

Gross Monthly Inc Other: 0.00

Dependent On Income: 1


C Enter the numbers shown here

3. Click the Forward  icon to move to page 2 of the UMDAP Information tab.


4. Enter the asset values shown here.

Family Registration	Family Members	UMDAP Information	BHRS Documentation
Asset Determination			
Saving			250.00
Bank Balances			550.00
Market Value Of Stocks			0.00
Market Value Of Bonds			0.00
Market Value Of Mutual Savings			0.00
Market Value Of Other			0.00
Total Of Liquid Assets			800.00
Asset Allowance From UMDAP Schedule			2000.00
Total Net Liquid Assets			0.00

NOTE: The fields labeled in red auto-calculate based on the information entered.


5. Click the Forward  icon to move to page 3 of the UMDAP tab.
6. Enter the expense values shown here.


Family Registration	Family Members	UMDAP Information	BHRS Documentation
Allowable Expenses			
Court Ordered Obligations Paid Monthly			0.00
Monthly Child Care			500.00
Monthly Dependent Support Payments			0.00
Monthly Medical Expense Payments			0.00
Monthly Deductions For Retirement Plans			0.00
Housing Costs			900.00
Housing Adjustment			450

7. Click the Forward  icon to move to page 4 of the UMDAP Information tab.
- This page displays the auto-calculated totals based on the information entered in the previous UMDAP pages.*

NOTE: You must now enter the monthly payment in the Agreed Monthly Payments to Satisfy Above Liability field toward the bottom of this screen. However, you must first submit the Family Registration window in order to run the UMDAP report.

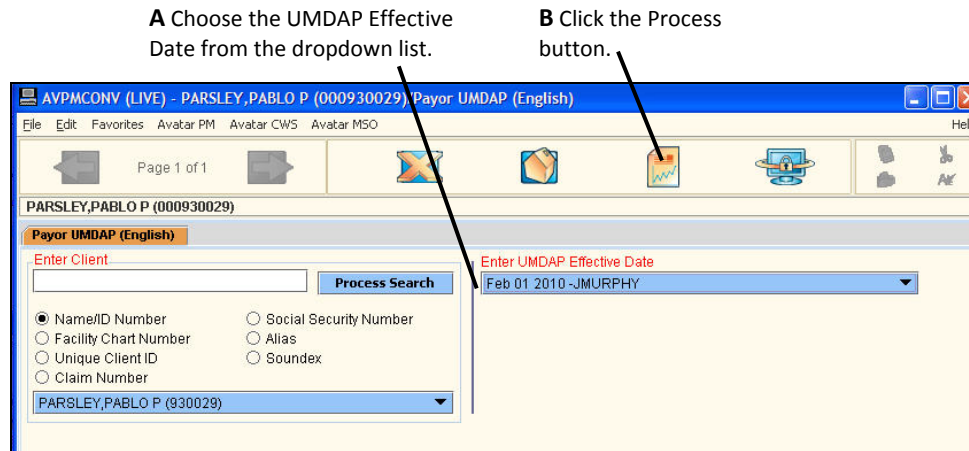
COMPLETE THE REMAINING REQUIRED FIELDS

8. Enter your name in the Approved By field.
9. Enter today's date in the Date Approved field.
10. Click the Forward  icon to move to page 5 of the UMDAP Information tab.



11. Enter your name in the Interviewer field.
12. Enter today's date in the Date Interviewed field.
13. Click the Submit  icon to save the information.

RUN THE UMDAP REPORT AND ENTER THE MONTHLY PAYMENT IN AVATAR

14. Choose Avatar PM → Reports → Payor UMDAP (English) from the Menu Frame.
15. Follow these steps to run the report:



When the report opens, note the payment amount at the bottom of the page.

16. Click the Print  button in the upper-left corner of the report window.
17. Click the Close  button in the upper-right corner of the report window.

18. Have the client, as well as the administrator or clinician, sign the report and then scan the signed document into Avatar. (See Lesson 10 in the Introduction to Avatar book for details on scanning documents.)

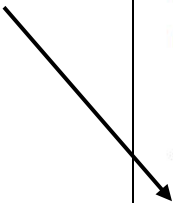
PAYMENT CONTRACT


The state requires that we charge you for mental health services based upon your ability to pay. Based on family income and number of people in the family, a fee is set. This fee may be adjusted if your financial situation changes. You will be notified in writing 30 days in advance if the fee for your services is changed.

Based on the fee determined by the above process, I agree to a payment plan as follows. I understand that I will make payments as stated below regardless of any insurance coverage I might have. I further understand that I will receive a refund if my payments and the insurance company payments exceed the cost of the service. I understand that by signing this statement, I am declaring under penalty of perjury under the laws of the State of California that the information I have given is true and correct. If the information is found to be incorrect and/or false, I understand that I will be billed for all services previously provided.

Not to exceed **\$3.08** per month.

_____ Date	_____ Signature of patient or guarantor
_____ Date	_____ Signature of Mental Health Representative




19. In the Payor UMDAP window, click the Close  icon on the Option toolbar to close the window.

COMPLETE THE FAMILY REGISTRATION

20. Choose Avatar PM→Client Management→Family and UMDAP Management→Family Registration from the Menu Frame.
21. Navigate to page 4 of the UMDAP Information tab.

22. Enter the monthly payment that appears on the UMDAP report as shown in the following figure.

Family Registration	Family Members	UMDAP Information	BHRS Documentation Tracking
Totals			
Total (Gross Monthly Income)		1500.00	
Total (Monthly Liquid Assets)		0.00	
Total (Gross Monthly Income and Monthly Liquid Assets)		1500.00	
Total (Allowable Expenses)		950.00	
Adjusted Gross Income		550.00	
Calculated UMDAP Annual Liability		37.00	
UMDAP Annual Liability		37.00	
Agreed Monthly Payments To Satisfy Above Liability		3.08	
Adjusted by			
Reason			
Approved by	Date Approved		
CATHY CLOVE	02/26/2010 <input type="button" value="T"/> <input type="button" value="Y"/>		

23. Click the Submit  icon on the Option toolbar to save the information.



CONCEPT REVIEW

See appendix for answers.

1. Entering the client as a family generates which number?
 - a. Family ID #
 - b. MR # (Client ID)
 - c. Pre-admit P #
2. If a client cannot pay the amount shown on the UMDAP report, the client should _____.
 - a. contact their attorney
 - b. refuse to sign the report
 - c. see their clinician for a therapeutic adjustment
 - d. ask the administrator to reduce the amount
3. In the Agreed Monthly Payments to Satisfy Above Liability field on page 4 of the UMDAP Information tab, the administrator should _____.
 - a. enter the amount shown on the UMDAP report
 - b. enter the amount the client is willing to pay
 - c. not enter anything
4. Family members who should be added to the family of the first client to enter the BHRS system are _____.
 - a. any family members in the same household
 - b. any extended family members, such as cousins, aunts, and uncles
 - c. only members who are also BHRS clients who have the same person responsible for paying BHRS bills
 - d. only family members who have the same last name as the original client
5. A single client can be a family.
 - a. True
 - b. False
6. The Family ID # is the same as the client's MR # (Client ID).
 - a. True
 - b. False
7. The Family Name is the name of the first person in a family who becomes a BHRS client.
 - a. True
 - b. False

8. Family members, such as siblings, cousins, and other people who have a relationship with the client should be entered in the BHRS Client Relationships window.
 - a. True
 - b. False
9. The start of the UMDAP year is _____.
 - a. the same as the admission date
 - b. the date the UMDAP is completed
 - c. the first day of the month in which the UMDAP is completed
10. You should scan the client's supporting financial documents, such as pay stubs into Avatar.
 - a. True
 - b. False

APPENDIX—CONCEPT REVIEW ANSWERS

1. a
2. c
3. a
4. c
5. a
6. b
7. a
8. a
9. c
10. a