UMDAP Financial Assessment in SmartCare

Effective 9/1/2024, MH programs will now be responsible for entry, update and maintenance of their Client's UMDAP document/information in SmartCare. All ACTIVE UMDAP records in CCBH were migrated to SmartCare and is accessible (based on your user role and access) for edits or annual updates.

To update an existing UMDAP document (migrated from CCBH)

- 1. Click on the client icon and search for your client.
- 2. Using the magnifying glass at the top left of your SmartCare home page, search for and select **UMDAP Financial Assessment (Client)**.

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9	UMDAP	Financi	al Assessment (Client)	2		

3. UMDAP Financial Assessment document opens. Click on the **Edit** button on the top right hand of the screen.

UMDAP Financial Assessme	ent						🗳 : 🖄 🛛 👓 🧞 i 🖬 🖶 🗅 🖬 Save 🗙
Effective 09/17/2024	🗮 🕶 Status S	Signed	Author	Puentes, Brianna		00	3 🕢 🛨
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	Client ID: 100147015				Page 1 of 3	<u>~</u>	
		SanDiego	ntySmartcareQA 9-1	6-2024			
		UMD	AP Financial Assessme	nt			
	Client Name: V	ni	DOB:	09/29/1955			
	Client ID: 1	5	Effective Date:	09/17/2024	_		
	Responsible Party In	nformation					
	Client is Responsible Party:	Yes	Medi-Cal Eligit	ble: Yes			

When Confirmation Message pops up, click OK.



UMDAP FINANCIAL ASSESSMENT IN SMARTCARE

UMDAP Financial Assessment in SmartCare

4. There five (5) different sections/tabs in the UMDAP Financial Assessment document. Each tab holds both demographics and financial information that the system use to determine client's ability to pay. Locate the specific data you wish/need to update, update information then click Save.

UMDAP Financial Assessment				
Effective 09/17/2024	Status In Progress	Author Puentes, Brianna		
Responsible Party Third Party Information	Responsible Party Third Party Information	Financial Liability UMDAP Liability Determination Other In	nformation	
Responsible Party Information	Third Party Inform Responsible Party Third	d Party Information Financial Liability UMDAP Liability De	termination Other Information	
Client is Responsible Party Ves No Name	Insurance Annual Period Medicare Policy ID Nur	Responsible Party Third Party Information	Financial Liability	rmation
	Annual Period Start Date	11/01/2025 Liquid Assets	sponsible Party Third Party Information Financial Liability	UMDAP Liability Determination Other Information
	Income	Savings \$ 0 IRA, CD, Market Value of Stocks, c	her Information	
	Responsible person	\$ 1258 Pi Checking Accounts \$ 1258	rovider of Financial Information (if other than patient or responsible	person)
		N	ame	Adjusted by system admin
		A	pproved by system admin	Adjusted Reason File Import
		A	oproval Date 09/17/2024	An explanation of the UMDAP liability was provided

To create a new document (for new clients or annual update)

- 1. Click on the client icon and search for your client.
- 2. Using the magnifying glass at the top left of your SmartCare home page, search for and select *UMDAP Financial Assessment (Client)*.

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Q		inancia	al Assessment			
6	UMDAP	Financi	al Assessment (Client)	2		

3. UMDAP Financial Assessment document opens. Click on the **New** button on the top right hand of the screen.

Effective 09/17/2024 Image: Signed Author Long, Amanda Image: Signed	
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Toursea Address	
Company:	
Insurance ID: Assignment/ Release of Information obtained:	
Medicare Policy Medi-Cal CIN: 9	
Annual Period	
Annual Period 07/01/2023 Annual Period End 06/30/2024 Start Date: Date:	



- 4. New document opens. The Author will default to the logged-in user who is completing the document in the system. Complete the rest of the information on each tab based on the current financial information you collected and provided by the client. When done, click Save.
 - Annual Period Start Date and Annual Period End Date under the Financial Eligibility automatically defaults.
 - System will not allow you to Sign/Save the document if you have Validation errors.
 - Zero (0) is an acceptable value in any currency (\$) field.
 - Agreed Upon Payment Plan is established by the program and client.
 - Program has the ability to complete annual update past 30 days. There is no need to contact MHBU for assistance.

MDAP Financial A	ssessment				
Effective 10/12/2024	Ċ	Status New		Author	Bugay, Maria Teresita
Responsible Party Thi	ird Party Information	Financial Liability	UMDAP Liability Determination	Other Information	_
Responsible Party In	formation				
Client is Responsible Party Name Date of Birth	Yes No Search Contact 12/01/1944		Medi-Cal Eligible Relationship to Client Marital Status	Self Never Married	~
Responsible Party Thi	ird Party Information	Financial Liability	UMDAP Liability Determination	Other Information	
Annual Period	07/01/2024 🛗 🗸	Annual Perio	od End Date 06/30/2025		
Income					
Responsible person Spouse Other Total gross monthly family i Number dependent on inco	SS				

Validations	* 🖂 🖕	• Sto	
Responsible Party - Responsible Party Information- Name is required Financial Liability - Financial Liability - Income - Responsible Person is required	Fina	nancial Assessment	
Financial Liability - Financial Liability - Income - Spouse is required	10/1	/12/2024 Eliza In Progress Author Bugay, Maria Teresitr	a
UMDAP Liability Determination - UMDAP Liability Determinatio Liquid Assets - Savings is required UMDAP Liability Determination - UMDAP Liability Determinatio	- - ▼ sible P	Party Third Party Information Financial Liability UMDAP Liability Determination Other Information	
	Liquid Asse	iets	
	Savings IRA, CD, Market Bonds and Mutu Checking Accou	s s s s s s s s s s s s s s s s s s s	