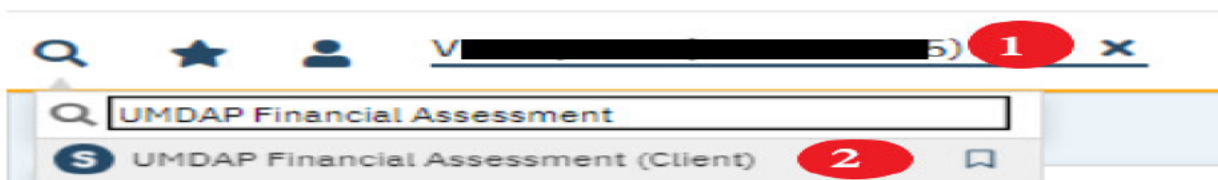


## UMDAP Financial Assessment in SmartCare

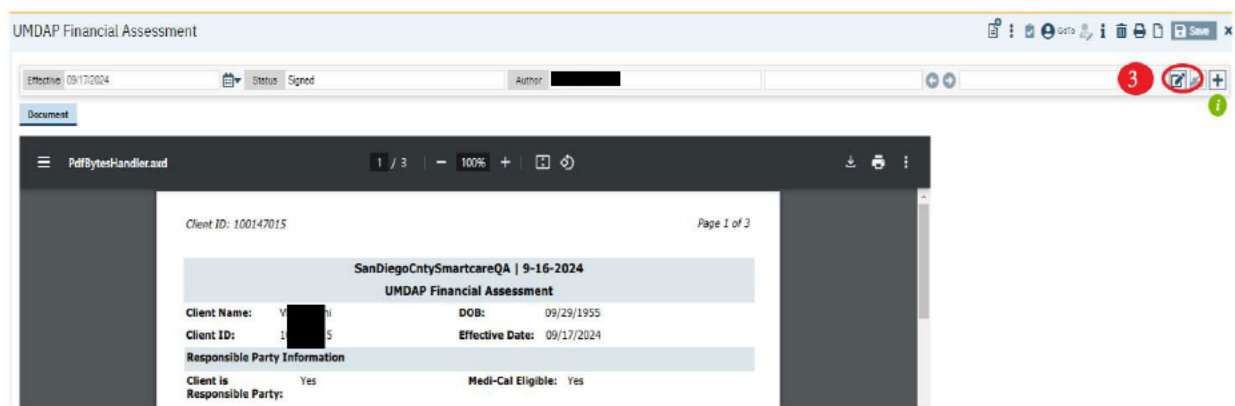
Effective 9/1/2024, MH programs will now be responsible for entry, update and maintenance of their Client's UMDAP document/information in SmartCare. All ACTIVE UMDAP records in CCBH were migrated to SmartCare and is accessible (based on your user role and access) for edits or annual updates.

### To update an existing UMDAP document (migrated from CCBH)

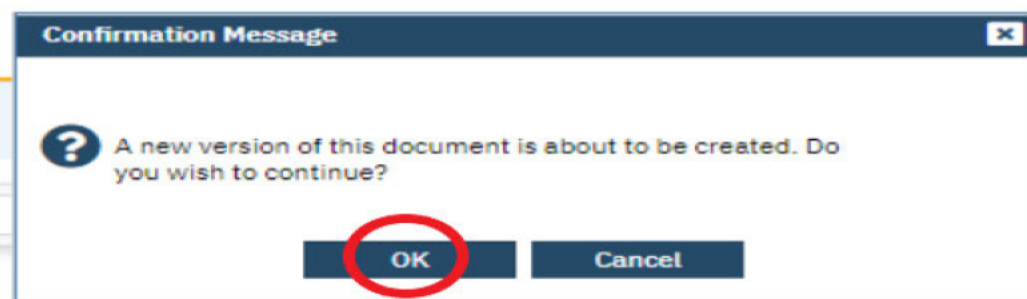
1. Click on the client icon and search for your client.
2. Using the magnifying glass at the top left of your SmartCare home page, search for and select **UMDAP Financial Assessment (Client)**.



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



When Confirmation Message pops up, click **OK**.



## UMDAP Financial Assessment in SmartCare

- 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: [REDACTED]

Responsible Party Third Party Information Financial Liability UMDAP Liability Determination Other Information

Responsible Party Information Third Party Information Financial Liability UMDAP Liability Determination Other Information

Client is Responsible Party:  Yes  No

Name: [REDACTED]

Annual Period

Annual Period Start Date: 04/01/2023

Liquid Assets

Asset Type	Amount
Savings	\$ 0
IRA, CD, Market Value of Stocks	\$ 0
Bonds and Mutual Funds	\$ 1250
Checking Accounts	\$ 1250

Other Information

Provider of Financial Information (if other than patient or responsible person)

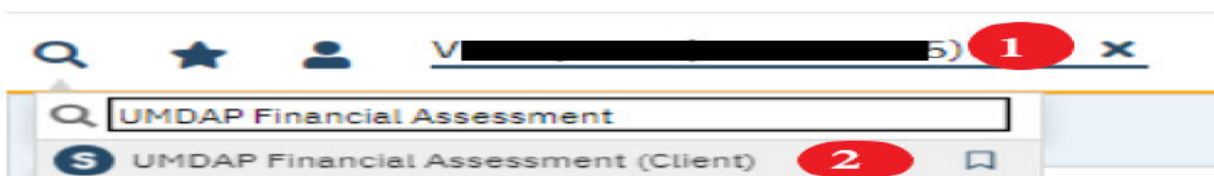
Name: [REDACTED] Adjusted by: system admin

Approved by: system admin Adjusted Reason: File Import

Approval Date: 09/17/2024 An explanation of the UMDAP liability was provided

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

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



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

UMDAP Financial Assessment

Effective: 09/17/2024 Status: Signed Author: [REDACTED]

Document

PutBytesthandler and 2 / 3 100% + -

Insurance Company: [REDACTED] Address: [REDACTED]

Insurance ID: [REDACTED] Assignment/Release of Information obtained: [REDACTED]

Medicare Policy ID Numbers: [REDACTED] Medi-Cal CIN: 9 [REDACTED] C

Annual Period

Annual Period Start Date: 07/01/2023 Annual Period End Date: 06/30/2024

## UMDAP Financial Assessment in SmartCare

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.

UMDAP Financial Assessment

Effective 10/12/2024 Status New Author [Redacted]

Responsible Party Third Party Information Financial Liability UMDAP Liability Determination Other Information

**Responsible Party Information**

Client is Responsible Party:  Yes  No  
 Name: Search Contact  
 Date of Birth: 12/01/1944  
 Medi-Cal Eligible:  Yes  No  
 Relationship to Client: Self  
 Marital Status: Never Married

Responsible Party Third Party Information **Financial Liability** UMDAP Liability Determination Other Information

**Annual Period**

Annual Period Start Date: 07/01/2024 Annual Period End Date: 06/30/2025

**Income**

Responsible person: \$  
 Spouse: \$  
 Other: \$  
 Total gross monthly family income: \$  
 Number dependent on income:

**Validations**

- Responsible Party - Responsible Party Information - Name is required
- Financial Liability - Financial Liability - Income - Responsible Person is required
- Financial Liability - Financial Liability - Income - Spouse is required
- UMDAP Liability Determination - UMDAP Liability Determination - Liquid Assets - Savings is required
- UMDAP Liability Determination - UMDAP Liability Determination -

Financial Assessment

10/12/2024 Status In Progress Author [Redacted]

Responsible Party Third Party Information Financial Liability **UMDAP Liability Determination** Other Information

**Liquid Assets**

Savings: \$  
 IRA, CD, Market Value of Stocks, Bonds and Mutual Funds: \$  
 Checking Accounts: \$ 3000