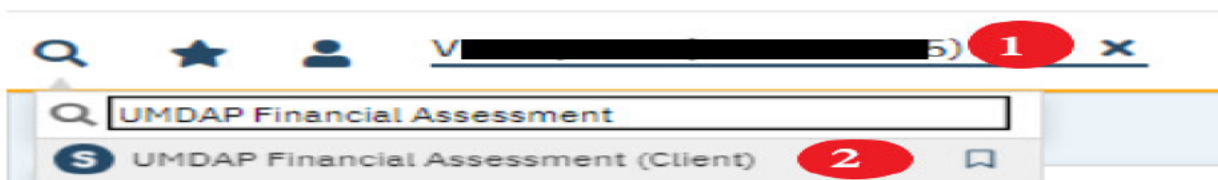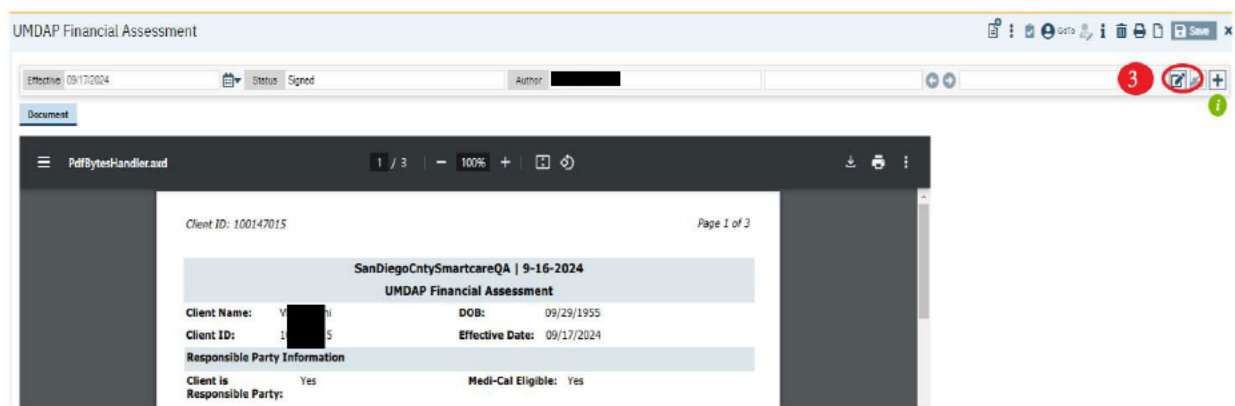# UMDAP Financial Assessment in SmartCare

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**.
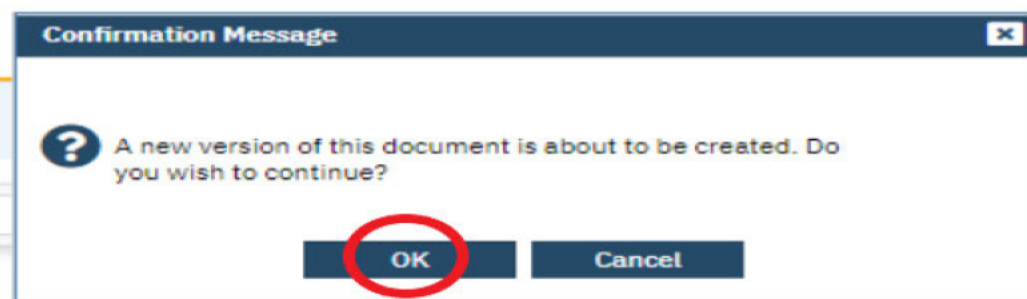
UMDAP Financial Assessment in SmartCare

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.

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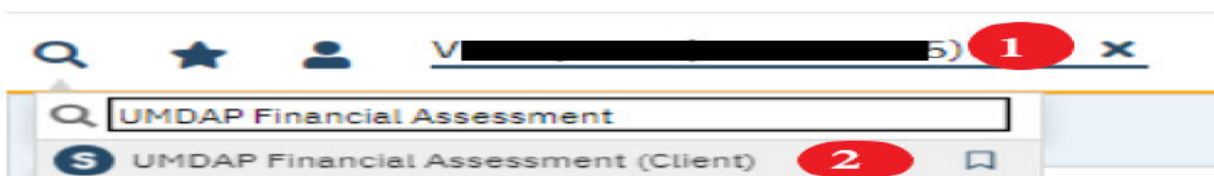
3. UMDAP Financial Assessment document opens. Click on the **New** button on the top right hand of the screen.

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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.