Division of Public and Behavioral Health
Policy

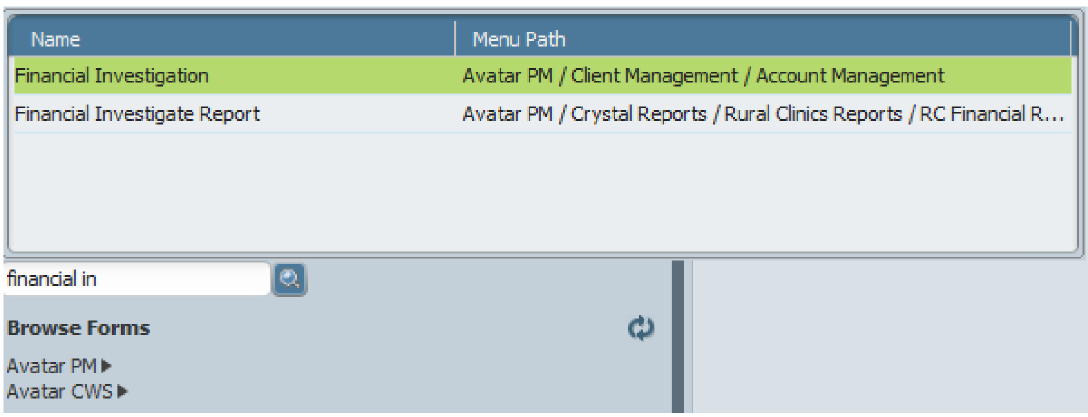
Control #	Rev.	Type	Title	Effective Date	Page
			Financial Investigation	date	1 of 4

1.0 Policy

It is the Policy of the Division of Public and Behavioral Health (DPBH), Substance Abuse, Prevention, and Treatment Agency (SAPTA) that all providers, in accordance with 505 (a) of the Public Health Service Act (42 US code 290aa-4) which directs the Administrator of the Substance Abuse and Mental Health Services Administration (SAMHSA), to collect items including admission and discharge data.

2.0 Procedure

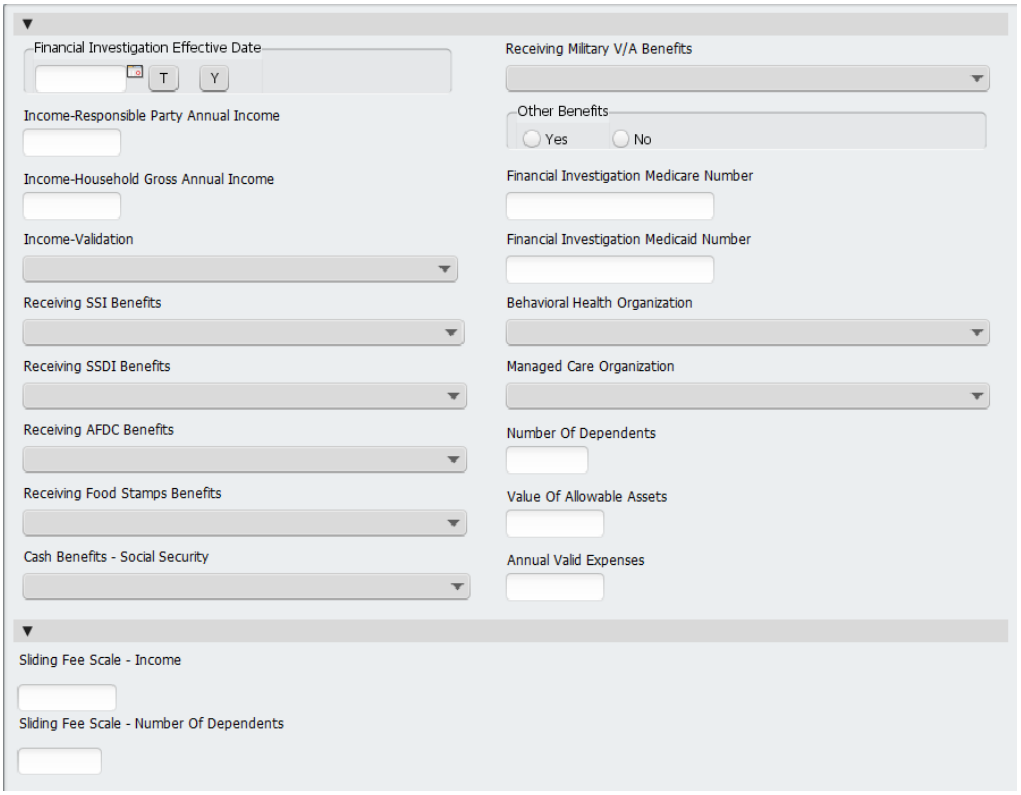
1. Type **Financial Investigation** into the **Search Forms** field of the **Forms & Data** widget.
   a. Smart search lists all the results that match the search criteria.



2. Select **Financial Investigation** form by double-clicking it from the drop-down menu.
   a. The **Select Client** window appears.

3. Enter the ID # or name in LAST,FIRST format of the relevant client.
   a. Search results will dynamically appear as you type.

4. Select your client by double-clicking on their name.
   a. The **Financial Investigation** form appears.



5. Enter the **Financial Investigation Effective Date** in the start date field either by MM/DD/YYYY or T-Today, Y-Yesterday. This is a required field.

6. Enter the relevant information in the **Income-Responsible Party Annual Income** field.
    a. This numerical free-text field has a 12 character maximum.

7. Enter the relevant information in the **Income-Household Gross Annual Income** field.
    a. This numerical free-text field has a 12 character maximum.

8. Click the down-arrow in the **Income-Validation** field to reveal the drop-down menu.
    a. Click the appropriate selection.

9. Click the down-arrow in the **Receiving SSI Benefits** field to reveal the drop-down menu.
    a. Single-click the appropriate selection.

10. Click the down-arrow in the **Receiving SSDI Benefits** field to reveal the drop-down menu. Single-click the appropriate selection.

11. Click the down-arrow in the **Receiving AFDC Benefits** field to reveal the drop-down menu. Single-click the appropriate selection.

12. Click the down-arrow in the **Receiving Food Stamps Benefits** field to reveal the drop-down menu.
    a. Single-click the appropriate selection.

13. Click the down-arrow in the **Cash Benefits – Social Security** field to reveal the drop-down menu.
    a. Single-click the appropriate selection.

14. Click the down-arrow in the **Receiving Military V/A Benefits** field to reveal the drop-down menu.
    a. Single-click the appropriate selection.

15. Select the appropriate radio button in the **Other Benefits** field.

16. Enter the applicable information in the **Financial Investigation Medicare Number** free-text field.
    a. This free-text field has a 20 character maximum.

17. Enter the applicable information in the **Financial Investigation Medicaid Number** free-text field.
    a. This free-text field has a 20 character maximum.

18. If applicable, click the down-arrow in the **Behavioral Health Organization** field to reveal the drop-down menu.
    a. Single-click the appropriate selection.

19. If applicable, click the down-arrow in the **Managed Care Organization** field to reveal the drop-down menu.
    a. Single-click the appropriate selection.

20. Enter a value in the **Number Of Dependents** field.
    a. This numerical free-text field has an 8 character maximum.

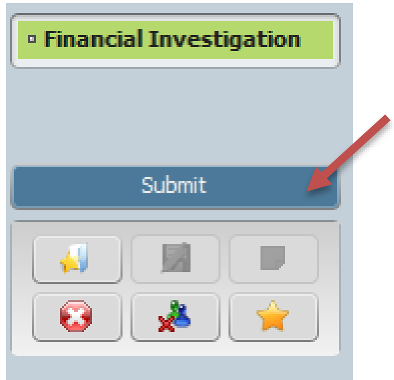
21. Enter a value in the **Value Of Allowable Assets** field.
    a. This numerical free-text field has a 10 character maximum.

22. Enter a value in the **Annual Valid Expenses** field.
    a. This numerical free-text field has a 10 character maximum.

23. Enter a value in the **Sliding Fee Scale - Income** field.
    a. This numerical free-text field has a 10 character maximum.
    b. **<u>This field MUST be completed in order for the sliding fee discount to be applied to all charges.</u>**

24. Enter a value in the **Sliding Fee Scale – Number Of Dependents** field.
    a. This numerical free-text field has a 10 character maximum.
    b. **<u>This field MUST be completed in order for the sliding fee discount to be applied to all charges.</u>**

25. After all available/applicable information is entered; click the **Submit** button in the top left-hand corner form tree.



26. This will save the financial information that was just entered and return you back to the Avatar home screen.