

Financial Eligibility Tip Sheet

Purpose of this Tip Sheet:

This Tip Sheet is designed to assist users on how to enter guarantors into Avatar using the Financial Eligibility form. Access to this form is given by attending Practice Management Training. The Tip Sheet may change as Avatar trainings are updated. If you have any additional questions please contact Avatar Support at 916-876-5806 or Avatar@Saccounty.net or Avatar-Fiscal@saccounty.net. If you have any questions on which guarantors would be appropriate to enter into the form please contact your contract monitor.

Guarantor Order:

It is important to enter guarantors into Avatar in the correct order.

1. Other health care (Kaiser, Blue Cross, Sutter, ect.)
2. Medi-Care
3. Medi-Cal
4. Client's share of cost or UMDAP
5. County funds (Match)

Each situation is unique to your client. If the client does not have one of the guarantors listed above you will skip that guarantor. If you need more clarification on which guarantors should be entered into Avatar ask your supervisor or contact Avatar-Fiscal@saccounty.net.

Financial Eligibility Form:

1. Open the “Financial Eligibility” form for your client.
2. The first page, “Financial Eligibility” will be greyed out. There is a “Coverage Comments” section. This can be used to enter comments whenever you update a client’s financial eligibility.
3. You will start on the second page of the form, “Guarantor Selection”.



4. The second page is where the guarantors are entered into the system. Guarantors are added into a multi-iteration table. In order to enter information for your guarantors click the button for “Add New Item”. A green line will appear when the item is added. Do not click multiple times as that will insert blank rows. The system will see this as missing information. If an extra row is added in error, highlight the row and click “Delete Selected Item”.

5. Once a new row is added you can fill in the form.
6. Enter the guarantor or guarantor code under the “Guarantor #” field. If you are unsure of the guarantor code you can run the “Guarantor by Class” report for a list of all guarantors listed in Avatar.
7. When the guarantor is added you will receive a pop-up stating the guarantor plan information will default click OK.

Confirm

Selecting This Guarantor Will Over-Write Any Previous Plan Information. The Master Plan Information Will Default.

8. The guarantor's information will default into the fields, DO NOT change this information.
9. Under "Customize Guarantor Plan" click "No". Later we will show how to customize a guarantor. You will receive a pop-up when clicking "No", click "OK".

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**This Will Delete Any Information Previously Filed
In 'Customize Plan'.**

10. Under "Eligibility Verified", this should always be "Yes".
11. Enter the "Coverage Effective Date", this will be the date of admission or when their coverage started.

<p>Guarantor # *</p> <p>Kaiser Foundation Health (300) <input type="button" value="Q"/></p>	<p>Guarantor's Address - Zipcode</p> <p>94604</p>
<p>Guarantor Name</p> <p>Kaiser Foundation Health</p>	<p>Guarantor's Address - City</p> <p>Oakland</p>
<p>Guarantor Plan *</p> <p>(Non-Contract) Commercial <input type="button" value="x"/> <input type="button" value="v"/></p>	<p>Guarantor's Address - State</p> <p>CALIFORNIA <input type="button" value="x"/> <input type="button" value="v"/></p>
<p>Customize Guarantor Plan *</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>	<p>Guarantor's Phone Number</p> <p>800-390-3510</p>
<p>Guarantor's Address - Line 1</p> <p>P.O. Box 12923</p>	<p>Effective Date Of Contract *</p> <p>01/01/2000 <input type="button" value="calendar"/> <input type="button" value="T"/> <input type="button" value="Y"/> <input type="button" value="up"/> <input type="button" value="down"/></p>
<p>Guarantor's Address - Line 2</p>	<p>Expiration Date Of Contract</p> <p><input type="button" value="calendar"/> <input type="button" value="T"/> <input type="button" value="Y"/> <input type="button" value="up"/> <input type="button" value="down"/></p>

12. The next section will default the client’s information from “Update Client Data” if there is missing information, close the form, go to “Update Client Data” and enter the information in there. Re-enter the “Financial Eligibility” form once you have submitted the changes. The defaulted information is based on the question “Client’s Relationship To Subscriber” this will default to “Self”. If the insurance plan is through a family member change the subscriber information to the family member’s information.

<p>Is This A Managed Care Contract</p> <p><input type="radio"/> Yes <input type="radio"/> No</p>	<p>Subscriber's Name *</p> <p>TEST,LUKAS</p>
<p>Insurance Code/Medicaid Tape</p> <p>1</p>	<p>Subscriber Address - Street Line 1 *</p> <p>444 Street Name</p>
<p>Eligibility Verified *</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>	<p>Subscriber Address - Street Line 2</p>
<p>Coverage Effective Date *</p> <p><input type="text"/> T Y</p>	<p>Subscriber Address - Zip *</p> <p>95827</p>
<p>Coverage Expiration Date</p> <p><input type="text"/> T Y</p>	<p>Subscriber Address - City *</p> <p>Sacramento</p>
<p>Client's Relationship To Subscriber *</p> <p>Self x v</p>	<p>Subscriber Address - County</p> <p>Select x v</p>
	<p>Subscriber Address - State *</p> <p>CALIFORNIA x v</p>
	<p>Subscriber Phone Number</p> <p>555-555-5555</p>
	<p>Subscriber's Social Security # *</p> <p><input type="text"/></p>
	<p>Subscriber Sex *</p> <p><input type="radio"/> Female <input checked="" type="radio"/> Male <input type="radio"/> Unknown</p>

13. On the next section the only field that needs to be filled out is the “Subscriber Policy #”. This field is not marked red and required however it is required for billing. This will be the client’s policy number for their insurance or their CIN number for Medi-Cal. This is not required when entering the county funds guarantor since there will be no subscriber number.

Subscriber's Birth Date 06/21/1988	Subscriber Group Name
Subscriber Employee ID #	Subscriber Group #
Subscriber Employer Name	Subscriber Policy # 999999990
Subscriber Employer ID Number	Subscriber MEDS ID#
Subscriber Employer's Add - Street	Subscriber Branch/Service Select
Subscriber Employer Add - Zip	Subscriber Military Status Select
Subscriber Employer's Add - City	

14. On the next section click "Yes" to the two red and required fields as well as the field below it. This allows the billing team to bill the guarantors.

Subscriber Treatment Auth. <input type="radio"/> Yes <input type="radio"/> No	Date Benefits Terminated
Subscriber Assignment Of Benefits * <input checked="" type="radio"/> Yes <input type="radio"/> No	Date Benefits Denied
Subscriber Release Of Info * <input checked="" type="radio"/> Yes <input type="radio"/> No	Denial Code Select
Coordination Of Benefits <input checked="" type="radio"/> Yes <input type="radio"/> No	Subscriber's Covered Days * 9999
Date Of Accident	Number Of Days For Interim Billing
	Maximum Covered Dollars * 9999999.99

15. No other fields on the form need to be filled out. Follow steps 4-14 for all other guarantors added for that client. Once completed, all guarantors entered will be listed in the multi-iteration table.

Guarantor #	Guarantor Name	Guarantor Plan	Customize Guarantor Plan	Guarantor's Address - Line 1
Kaiser Foundation Health (300)	Kaiser Foundation Health	3	No	P.O. Box 12923
MH County Funds (20)	MH County Funds	24	No	
DMH - SD/MC (3)	DMH	1	No	1600 9th Street

16. Go back to the first page of the form “Financial Eligibility”.

17. The guarantor order will now be red and required. Each guarantor drop-down will list the guarantors you entered. Select each guarantor in the appropriate order based on the guarantor order shown at the beginning of this tip sheet. Click “Submit” to save.

Removing a Guarantor:

If a client loses coverage on a particular guarantor you will want to end date the guarantor. It is important to have a record of the previous coverage for billing purposes. The steps below show how to end-date a guarantor.

Warning: Do not delete a guarantor if services have been entered for that guarantor, this can affect your billing. If a guarantor was entered in error, reach out to Avatar-Fiscal@sacounty.net for instruction on how to fix the error.

1. Open the “Financial Eligibility” form for the client you are working on.
2. Go to the second page of the form, “Guarantor Selection”.
3. Double click on the guarantor in the multi-iteration table to select it.
4. Scroll down to “Coverage Expiration Date”. Enter the date the coverage expired.

5. Repeat steps 3&4 for each guarantor that has expired.
6. Click “Submit” to save.

Customizing a Guarantor:

If a guarantor is end dated but later re-instated you will need to customize the entry. Below are the steps to customize a guarantor.

1. Open the “Financial Eligibility” form for the client you are working on.
2. Go to the second page of the form, “Guarantor Selection”.
3. Double click on the guarantor in the multi-iteration table that needs to be customized.
4. Under “Customize Guarantor Plan” switch the selection from “No” to “Yes”.
5. Scroll down to the “Coverage Expiration Date”. You will want to remove the date from this field since their coverage is no longer expired. You will want to save this date since we will later need to tell the system when the coverage previously expired. You can remove the date and write it on a scratch paper or use the shortcut on your keyboard “Ctrl” “X” to cut the date and save it.

6. Scroll to the bottom of the page to the “Default Plan Start/End Date” section.

- Enter the new plan start date under the “Default Plan Start Date” field and the date you copied in step #5 on the “Default Plan End Date” field. Click “Yes” on “Create New Levels from Master Record of Benefit Plan” and then the button “Default and Edit Plan Levels”.

New plan start date

Date copied from coverage expiration date

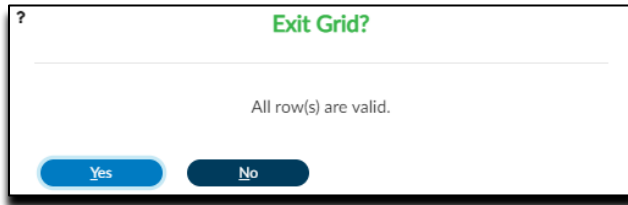
- A table will populate. The table is showing the default start date to each level of the guarantor plan, the end date you indicated (when they lost coverage) and the new start date. Click “Save”.

FINANCIAL ELIGIBILITY | FORM: TEST, LUKAS (788475565)

Index	Level Start Date ↕	Level End Date ↕
1	05/01/2009	06/30/2015
2	07/01/2015	03/01/2022
3	07/01/2015	03/01/2022
4	07/01/2015	03/01/2022
5	07/01/2015	03/01/2022
6	04/01/2022	
7	04/01/2022	
8	04/01/2022	
9	04/01/2022	

Save Close/Cancel

9. A pop-up will appear, click “Yes”.



10. Continue steps 3-9 for each guarantor that needs to be customized. Click “Submit” to save.