



Division of Public and Behavioral Health Policy

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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.

The screenshot shows a search interface with a search bar containing the text "financial in". Below the search bar, a table displays search results. The table has two columns: "Name" and "Menu Path". The first row is highlighted in green and shows "Financial Investigation" with the menu path "Avatar PM / Client Management / Account Management". The second row shows "Financial Investigate Report" with the menu path "Avatar PM / Crystal Reports / Rural Clinics Reports / RC Financial R...". Below the search bar, there is a "Browse Forms" section with a refresh icon and two items: "Avatar PM" and "Avatar CWS", both with right-pointing triangles.

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.



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The screenshot shows a web-based form for financial investigation. It is organized into two columns. The left column contains: 'Financial Investigation Effective Date' (a date picker with MM, DD, and Y buttons), 'Income-Responsible Party Annual Income' (a text input), 'Income-Household Gross Annual Income' (a text input), 'Income-Validation' (a dropdown menu), 'Receiving SSI Benefits' (a dropdown menu), 'Receiving SSDI Benefits' (a dropdown menu), 'Receiving AFDC Benefits' (a dropdown menu), 'Receiving Food Stamps Benefits' (a dropdown menu), and 'Cash Benefits - Social Security' (a dropdown menu). The right column contains: 'Receiving Military V/A Benefits' (a dropdown menu), 'Other Benefits' (radio buttons for 'Yes' and 'No'), 'Financial Investigation Medicare Number' (a text input), 'Financial Investigation Medicaid Number' (a text input), 'Behavioral Health Organization' (a dropdown menu), 'Managed Care Organization' (a dropdown menu), 'Number Of Dependents' (a text input), 'Value Of Allowable Assets' (a text input), and 'Annual Valid Expenses' (a text input). At the bottom, there are two more text input fields: 'Sliding Fee Scale - Income' and 'Sliding Fee Scale - Number Of Dependents'.

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.



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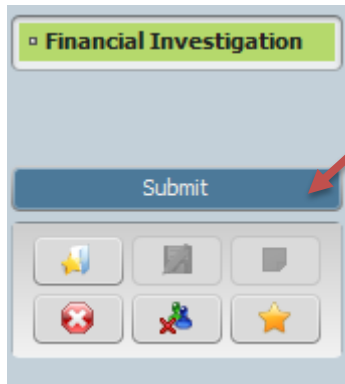
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13. Click the down-arrow in the **Cash Benefits – Social Security** field to reveal the drop-down menu.
 - a. Single-click the appropriate selection.
14. Click the down-arrow in the **Receiving Military V/A Benefits** field to reveal the drop-down 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. This field MUST be completed in order for the sliding fee discount to be applied to all charges.**
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. This field MUST be completed in order for the sliding fee discount to be applied to all charges.**
25. After all available/applicable information is entered; click the **Submit** button in the top left-hand corner form tree.



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