



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.

In order to maintain guarantors, the facilities will be in charge of updating their guarantors in Avatar based on the insurance companies they are billing for services. For all SAPTA guarantors, SAPTA will be in charge of keeping these updated.

2.0 Procedure

1. On the Home Screen in Avatar, in the **Search Forms** field, search for the **Guarantors/Payors** form.
 - a. Double-click the highlighted selection to open the form.

Name	Menu Path
Guarantors/Payors	Avatar PM / System Maintenance / System Definition

2. The **Guarantor/Payors** form will appear.
 - a. To view a list of guarantors in the system, click **Edit**.
 - b. This will open the drop down menu for **Guarantor Code**.
 - c. Choose which one you'd like to view.
 - d. Do NOT change any unless you've consulted with the SAPTA Avatar HelpDesk.
3. To add a new guarantor/payor, click on **Add**.

Add New or Edit Existing Guarantor

Add Edit

4. Enter a unique guarantor code in the **New Guarantor Code** field.
 - a. This must be a code that is not already used.
 - b. Ensure the code hasn't been used by editing the guarantor to look at the list.
 - c. Starting with 1,000 and adding to that is probably the best in order to keep new guarantors separate from ones already in the system.

New Guarantor Code

1000



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5. **Inactive Guarantor:** Choose **No**.

6. **HIPAA Transaction Version:** Choose **Version 5010**.

The screenshot shows two form sections. The first section is titled 'Inactivate Guarantor' and contains two radio buttons: 'Yes' (unselected) and 'No' (selected). Below this is a 'File' button. The second section is titled 'HIPAA Transaction Version' and contains two radio buttons: 'Version 4010' (unselected) and 'Version 5010' (selected).

7. Enter the guarantor name in both fields: **Guarantor Name** and **Guarantor Name for Alpha Lookup**.

8. Enter the **zip code**.

The screenshot shows three form fields. The first is 'Guarantor Name' with the value 'Great West Insurance'. The second is 'Guarantor Name For Alpha Lookup' with the value 'Great West Insurance'. The third is 'Guarantor's Address - Zip Code' with the value '89706'.

9. Enter the guarantor's address:

a. **Guarantor's Address – Street**

b. **Guarantor's Address – Street 2**

c. **Guarantor's Address – City** (should auto-populate based on zip code)

d. **Guarantor's Address – State** (should auto-populate based on zip code)

The screenshot shows four form fields for the address. The first is 'Guarantor's Address - Street' with the value '123 Happy Street'. The second is 'Guarantor's Address - Street 2' with the value 'Suite 1222'. The third is 'Guarantor's Address - City' with the value 'Carson City'. The fourth is 'Guarantor's Address - State' with a dropdown menu showing 'NEVADA'.

10. Enter the **Guarantor's Phone Number**.

The screenshot shows a single form field for 'Guarantor's Phone Number' with the value '775-684-5555'.

11. Choose the correct **Financial Class** from the dropdown choices.



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- Blue Cross
- Champus
- Commercial – use for private insurance companies
- County – use for county grants/monies
- Grants – use for grants
- HMO
- Medicaid
- Medicare A
- Medicare B
- No Fault/Comp
- Non-Recoverable
- Self-Pay
- State
- Voucher

Financial Class

12. Always choose **Non-Contract Guarantor** in the **Guarantor Nature** field.

Guarantor Nature

13. Choose the correct **Guarantor Plan** that coincides with Step 11 above.

Guarantor Plan

14. Choose **Yes** in the **Allow Customization of Guarantor Plan** if you want the option to customize this plan.

- a. This is a standard selection.

Allow Customization Of Guarantor Plan
 Yes No

15. In the **Default 'Client's Relationship to Subscriber'** in **Financial Eligibility** field, choose **Self** if you want the system to default the client's information into this field on the financial eligibility form.

Default 'Client's Relationship To Subscriber' In Financial Eligibility



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16. At this time, nothing else on this form needs to be completed. All other information can be updated by the Avatar Helpdesk if electronic billing is enabled, etc.

17. Click **File** in the top of the page in order to save this guarantor.

▼

Add New or Edit Existing Guarantor

Add Edit

New Guarantor Code

Guarantor Code

Inactivate Guarantor

Yes No

File

Transaction Version

Version 4010 Version 5010

Guarantor Name

Guarantor Name For Alpha Lookup

Guarantor's Address - Zip Code

Guarantor's Address - Street

Guarantor's Address - Street 2

Guarantor's Address - City

Guarantor's Address - State

Guarantor's Phone Number

Financial Class

Guarantor Nature

Guarantor Plan

Allow Customization Of Guarantor Plan

Yes No