SHARECARE QUICK REFERENCE GUIDE - ABILITY TO PAY

Version 9.0.0

INTRODUCTION

FATP and UMDAP

UMDAP is the Unified Method of Determining Ability to Pay. The UMDAP flag is used to calculate the correct FATP, Family Ability To Pay, amount for a Consumer based on income, assets, and expenses. In California, UMDAP is required by State law to ensure that all Consumers are responsible for some portion of the payment for the services they receive insofar as a consumer has some ability to pay.

UMDAP is "yearly liability," meaning that the amount to pay is an annual amount for the Consumer and the Consumer's immediate family. When the Consumer or family member receives services, the UMDAP fee must be paid, or payment must be made for the actual service cost, whichever is the lesser amount.

A Mental Health consumer's "Ability to Pay" (ATP) is based on the Consumer's income and the number of dependents. The ATP amount is what the Consumer is required to pay on an ANNUAL basis. The ATP amount is considered a FAMILY ATP, meaning the entire family is only required to pay that amount on an annual basis.

WORKING WITH THE CONSUMER FAMILY ATP TAB

Navigate to **Access > Consumer > Family ATP** tab.

1- The application defaults to the **Family** screen.

- Enter a Family Name (or Family ID), then TAB or click the blue, underlined hyperlink to search

> 💡*Tip:* It can be difficult to find the Family ID associated with the consumer by only searching with the consumer last name. In the Family Name Lookup box enter %consumer_ID% (for example, enter %123456789% to search for the Family ID associated with consumer ID 123456789). In ShareCare, the "Family Names" have the same pattern: **Consumer_Last_Name [Consumer ID]**

- If the Family Name/ID does not exist, enter a Family Name using the pattern:
  Consumer_Last_Name [Consumer_ID]

- Select the **Ability to Pay Methodology** to determine the Family ATP, Annual (default) or Monthly and select System of Care and click Add.

> ⚠️AOD uses a monthly sliding scale. This does not affect UMDAP and how it works.
>
> ⚠️If the Family ATP is set for the ADP system of care, ShareCare automatically uses the Sliding Scale instead of the UMDAP.
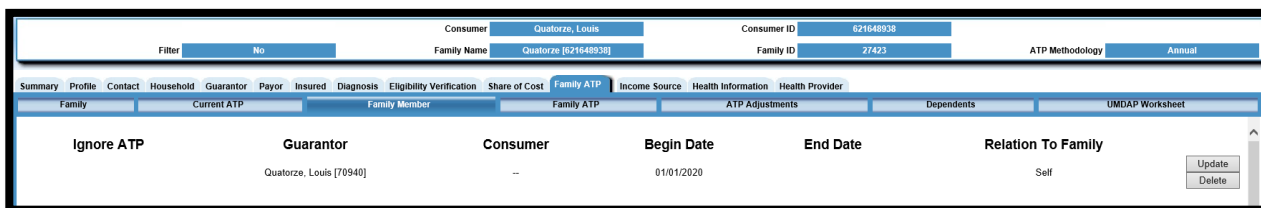
2- Select **Current ATP** to display a read-only summary screen for current Ability To Pay information entered on the other flags. If no information is displayed, the applicable data must be entered for the Consumer and current period.

3- Select **Family Member** to display the screen for adding, updating, or deleting family members.

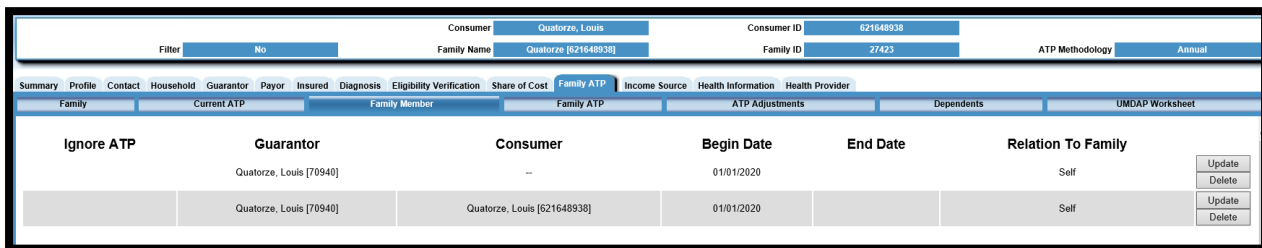- ShareCare needs a **Guarantor** **and** a **Consumer** record (entered in that order) associated with the Family ID.

> ⚠️ The Consumer and Guarantor must already be entered in *ShareCare* to be added to the Family ATP.

- **Step #1 -** Add the Guarantor.
  - Click "New"
  - Enter the Guarantor data (ID or last name, Begin Date and Relation to Family: select "Self" if the Consumer is his(her) own Guarantor)
  - Click "Add"
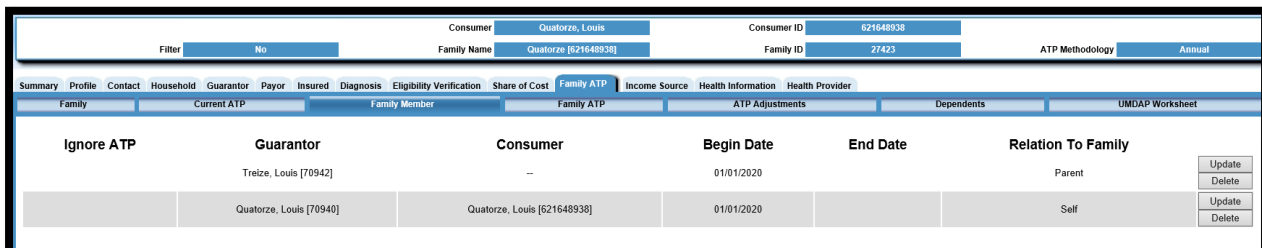
- **Step #2 -** Add the Consumer.
  - Click "New"
  - Enter the Consumer data (ID or last name, Begin Date and Relation to Family)
  - Click "Add"
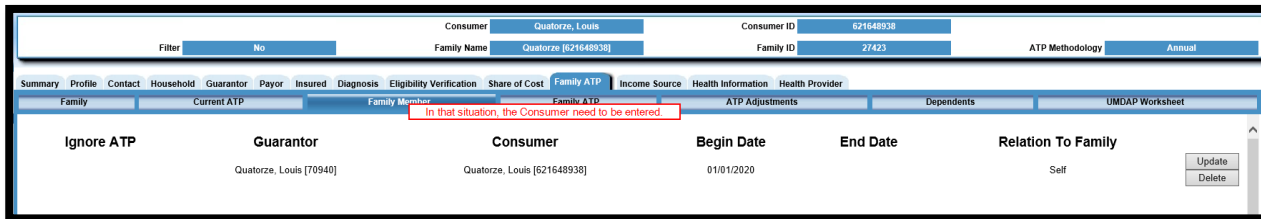
- To edit an existing family member, click the Update button next to the listed family member
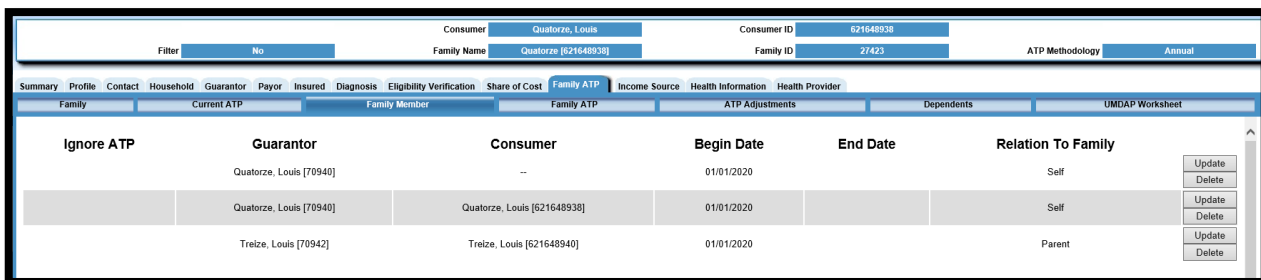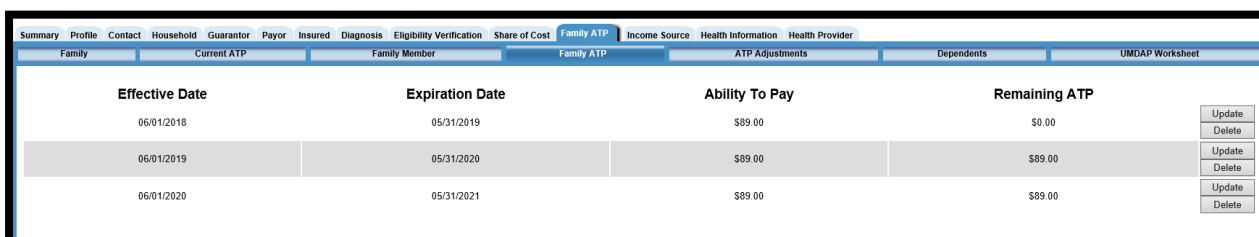- In a situation where the Guarantor is NOT the Consumer, the steps are the same

> ⚠ If you enter the Consumer first and ShareCare displays both the Guarantor and Consumer, shown in the screenshot below, it appears as if a family member was added. In fact, there is only a Guarantor with no family members. For this reason, the Guarantor must be added first followed by the Consumer, even for a family of one.

- **Step #3** – Add Dependents if needed.
  - ○ Click "New"
  - ○ Enter the Consumer data (ID or last name, Begin Date and Relation to Family)
  - ○ Click "Add"

4- Select **Family ATP:**
- Family ATP reflects the data when the UMDAP Worksheet has been set up and displays all Family ATP data from previous years to the current year
- Can be used to enter data without using the UMDAP Worksheet

- To manually enter a Family ATP:
  - ○ Click the New button at the top of the screen to enter a new eligibility date and amount
  - ○ Enter the Effective Date and Expiration Date for the Ability to Pay period
  - ○ Enter the amount required for the Consumer's responsibility in the Ability To Pay field
  - ○ Click the Add button at the top of the screen
- Click on the *Update* button to edit an existing record

5- Select **ATP Adjustments** (if required):

These adjustments are typically used when special circumstances arise for the Consumer that are not reflected in the Family Ability To Pay calculation.

- Click the New button at the top of the screen to enter a new ATP Adjustment
- Enter Date of Service, Amount, Comment, and select an Adjustment Code.
- Click the Add button at the top of the screen.

6- The **Dependents** flag is only used for AOD / Sliding Scales.

UMDAP WORKSHEET SETTINGS

7- Use the **Access > Consumer > Family ATP > UMDAP Worksheet** screen to calculate the UMDAP amount.

- Click the New button at the top of the screen
- Enter Begin Date
- Select an Income Source, enter the dollar Amount for that Income Source, then click "Add"
- Repeat these steps to add additional income

- Enter the Number of Persons Dependent on Income
- Select an Asset Type, enter the dollar Amount for that Asset Type, then click "Add"
- Repeat these steps to add additional assets

- Enter any Court ordered obligations paid monthly
- Enter Monthly childcare payments (necessary for employment)
- Enter Monthly dependent support payments
- Enter any Monthly medical expense payments (in excess of 2% of the gross income)
- Enter Monthly mandated deductions from gross income for retirement plans (not including Social Security)

The worksheet creates totals and calculates the UMDAP amount:
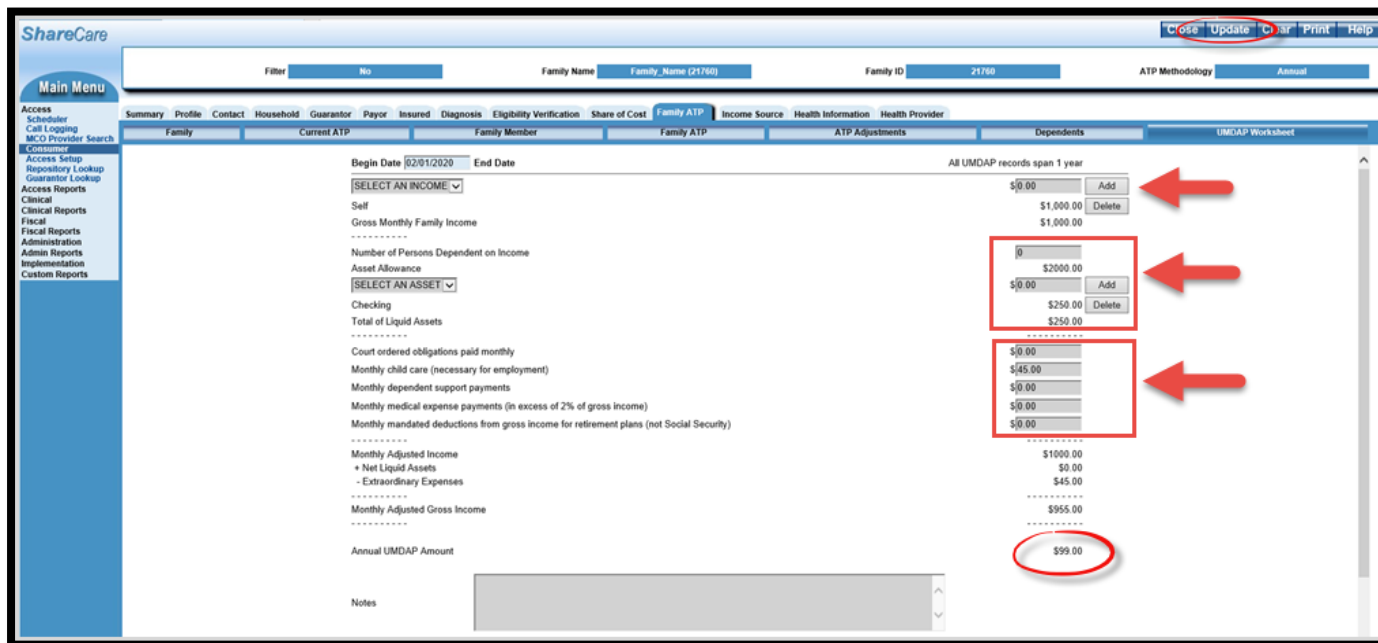

- UMDAP Worksheet Totals:
  - o Using the worksheet data, ShareCare calculates the Monthly Adjusted Gross Income on which the UMDAP amount is based

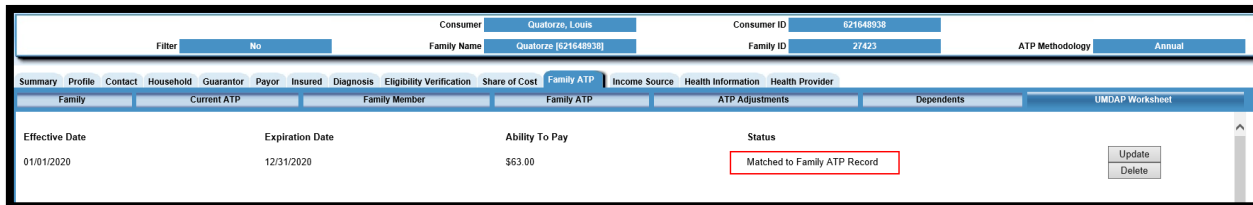> 💡 **Tip** Don't forget to Update! ShareCare reverts to the main "**UMDAP Worksheet**" screen.

  - o The original view on the main UMDAP Worksheet screen shows the summary information. Adjacent to each worksheet are the Update and Delete buttons. Click Update to modify the existing record

> ⚠ The UMDAP record ends after one year and needs to be renewed.

- The "Status" of each ATP record displays a "Create Family ATP Record" button (see below). Select this button so that the UMDAP amount matches the amount entered on the Family ATP flag
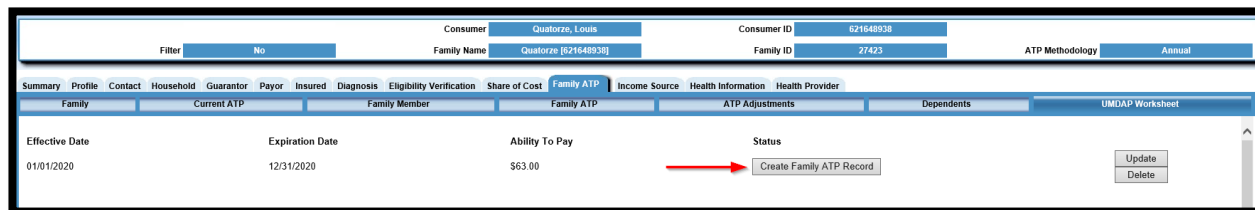
- ShareCare then displays the status "Matched to Family ATP record," as shown below
- If the Ability to Pay is a different amount than that entered on the Family ATP flag (if applicable), the "Ability to Pay" amount displays in red text, and the "Status" message indicates there is an amount conflict
- Fix the amount on the Family ATP screen or on the UMDAP Worksheet screen, whichever is in error
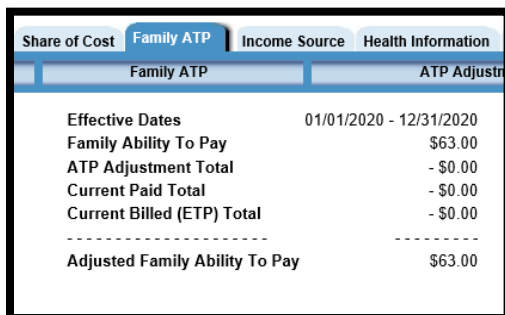
- Other calculations such as Adjustments are made automatically according to the amount entered on the Family ATP screen

WHAT HAPPENS NEXT?

8- Once the ATP amount is billed to the Consumer, the ATP Amount is adjusted until it reaches zero. Once zero is reached, all remaining charges incurred for that year are adjusted to $0.00. Since this is an annual ATP, the process starts again after the Expiration Date, and the Consumer is billed the ATP amount again.

- The invoices should show the original amount billed and then an adjustment related to the ATP amount due. In the end, the Guarantor should only be billed the ATP amount. Everything else should be zero.

- For Example:

    i. Family ATP = $63.00

ii.   Service is billed for $293.40. The first Payor pays $273.40, and a $20.00 charge goes to the Guarantor.

Receive Payments	Batch Receive Payments	Refunds	Auto Receive Payments	Cash Receipts	Electronic Payments	Status Reader				
Lookup		Invoice			11/01/2020					

Transaction Date	11/01/2020			Charge	$293.40		Provider	Fritz,		
Procedure	03 - MH Case Management			Transactions ID	5578433		Program	Child		
Consumer Service ID	2183111			Service Date	11/01/2020					

Payor	Charge	Paid	Adjusted	Transaction Date	Receipt Number	EOB Approval Date	Check Number	Type
Medi-Cal MHS [10]	$0.00	$273.40	$20.00					
[Detail]	-	-	-	12/10/2020				Charge Schedule Rate
[Detail]	-	$273.40	-	12/10/2020		12/10/2020		Payment
[Detail]	-	-	$20.00	12/10/2020				ADJ: Manual ETP Transfer
Guarantor - Quatre, Henri [70944]	$20.00	$0.00	$273.40					
[Detail]	$20.00	-	-	12/10/2020				Charge Schedule Rate
[Detail]	-	-	$273.40	12/10/2020		12/10/2020		ADJ: Prior Payor Payment
Alternate	$0.00	$0.00	$0.00					
TOTAL	$20.00	$273.40	-					

iii.   The Current ATP screen after the charges above shows $43.00 remaining and $20.00 billed:

Share of Cost	Family ATP	Income Source	Health Information	Hea
	Family ATP		ATP Adjustments	

Effective Dates	01/01/2020 - 12/31/2020
Family Ability To Pay	$63.00
ATP Adjustment Total	- $0.00
Current Paid Total	- $0.00
Current Billed (ETP) Total	- $20.00
- -	- - - - - - - - -
Adjusted Family Ability To Pay	$43.00

iv.   The Current ATP screen after the Guarantor pays $20.00:

Share of Cost	Family ATP	Income Source	Health Information
	Family ATP		ATP Adjustm

Effective Dates	01/01/2020 - 12/31/2020
Family Ability To Pay	$63.00
ATP Adjustment Total	- $0.00
Current Paid Total	- $20.00
Current Billed (ETP) Total	- $0.00
- -	- - - - - - - - -
Adjusted Family Ability To Pay	$43.00

v.   Then another service is billed for $293.40. The first Payor pays $193.40, and $100.00 is adjusted for the Guarantor, but only $43.00 is charged because of the $43.00 remaining ATP.

vi.   The Guarantor pays the remaining $43.00:

vii.   The Current ATP is down to $0.00.

viii. If another new service is billed for $293.40 and the first Payor pays $173.40, $120.00 is adjusted for the Guarantor, but the Guarantor is not charged because there is no more remaining ATP.