

# 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.

A 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.

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

- **<u>Step #1</u>** Add the Guarantor.
  - o 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)
  - o Click "Add"



- <u>Step #2</u> Add the Consumer.
  - o Click "New"
  - o Enter the Consumer data (ID or last name, Begin Date and Relation to Family)
  - o Click "Add"

		Filter	No		Consumer Family Name	Quatorze, Louis Quatorze [621648938]		Consumer ID Family ID	621648938 27423		ATP Methodology	Annual
Summar	y Profile Contact Family	Household Guara Current A	intor Payor In ATP	sured Diagnosis I Famil	Eligibility Verification SI y Member	are of Cost Family ATP Family ATP	Income S	ource Health Information Health ATP Adjustments	n Provider	Dependents	UMDA	\P Worksheet
	Ignore ATP		Guarant Quatorze, Louis	tor [70940]	(	Consumer		Begin Date End Date		R	Update	
			Quatorze, Louis [70940]		Quatorz	Quatorze, Louis [621648938]		01/01/2020			Self	Update Delete

- 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

						Consume	Quatorze, Louis		Consum	er ID	621648938				
		Filter	No			Family Name	Quatorze [621648938]		Fam	ily ID	27423		ATP Methodology	Annual	
Summary Profile C	Profile Contact Household Guarantor Payor Insured Diagnosis Eligibility Verification Sha		Share of Cost Family ATP	Income !	Source Health Information	Health Provid	er								
Family		Current ATP			Fami	ily Member	Family ATP		ATP Adjustr	nents		Dependents	UM	DAP Worksheet	
Ignore A	ATP	Guarantor		Consumer		Begin Date		End Date		Relation To Family					
		Т	eize, Loui	s [70942]		-			01/01/2020			Parent		De	Ipdate Delete
	Quatorze, Louis [70940] Quate		orze, Louis [621648938]		01/01/2020				Self	Up De	lpdate Delete				



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.

	Consumer	Quatorze, Louis Consumer	ID 621648938		
Filter No	Family Name Qu	torze [621648938] Family	ID 27423	ATP Methodology	Annual
mmary Profile Contact Household Guarantor Payor Insu	red Diagnosis Eligibility Verification Share of Co	Family ATP Income Source Health Information H	ealth Provider		
Family Current ATP	Family Member	Family ATP Adjustme	nts D	ependents UM	DAP Worksheet
Ignore ATP Guaranto	r Consu	ner Begin Date	End Date	Relation To Family	^
Quatorze, Louis [70	0940] Quatorze, Louis	521648938] 01/01/2020		Self	Update Delete

- <u>Step #3</u> Add Dependents if needed.
  - Click "New"
  - o Enter the Consumer data (ID or last name, Begin Date and Relation to Family)
  - Click "Add"

	Filter No	Consumer Quatorze, Louis Family Name Quatorze (621648938)	Consumer ID Family ID	621648938 27423	ATP Methodology	Annual
Summary Profile Contact H Family	lousehold Guarantor Payor Insured Diagnosis Current ATP Familia	Eligibility Verification Share of Cost Family ATP Income S ty Member Family ATP	ource Health Information Health ATP Adjustments	Provider	rependents UMDAP Wor	ksheet
Ignore ATP	Guarantor Quatorze, Louis [70940]	Consumer	Begin Date 01/01/2020	End Date	Relation To Family	Update
	Quatorze, Louis [70940]	Quatorze, Louis [621648938]	01/01/2020		Self	Update
	Treize, Louis [70942]	Treize, Louis [621648940]	01/01/2020		Parent	Update Delete

#### 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

Summary Prot	file Contact	Household Cur	Guarantor F	Payor Insu	ured Diagnosis	Eligibility Verification	Share of Cost	Family ATP	Income Source	e Health Informatio	n Health Provider	Dependente		LINDAD Worksho	at
Failing	y	Cur	TentATP	_	Faili	ily weilider		Palling ATP	_	ATP Auju	isunents	Dependents		OMDAP WORKShe	ยเ
	Effec	tive Date				Expiration D	ate			Ability To I	Pay	F	Remaining	ATP	
	06	/01/2018				05/31/2019				\$89.00			\$0.00		Update Delete
	06	/01/2019				05/31/2020				\$89.00			\$89.00		Update Delete
	06	/01/2020				05/31/2021				\$89.00			\$89.00		Update Delete

- To manually enter a Family ATP:
  - o Click the New button at the top of the screen to enter a new eligibility date and amount
  - o Enter the Effective Date and Expiration Date for the Ability to Pay period
  - o 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)



reCare					Cose Update Char Print He
ain Menu	Filter No	Family Name Family_Name (2)	Family ID	21760	ATP Methodology Annual
summary Profile	Contact Household Guarantor Payor Insured Diagn	osis Eligibility Verification Share of Cost Family AT Family Member Family AT	P Income Source Health Information Health Pro	vider Dependents	UNDAP Worksheet
novider search	Begin Date 02/01/2020	End Date		All UMDAP records span 1 year	
Reports Reports	SELECT AN INCOME			\$0.00 Add \$1,000.00 Delete	-
leports stration	Gross Monthly Family Inco	me dant on Income		\$1,000.00	
entation Reports	Asset Allowance	dent on soloning		\$2000.00 \$0.00 Add	
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	Court ordered obligations p	aid monthly		\$ <mark>0.00</mark>	ī, l
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	Monthly medical expense p Monthly mandated deduction	bayments (in excess of 2% of gross income) ons from gross income for retirement plans (not Social S	iecurity)	\$ 0.00 \$ 0.00	
	Monthly Adjusted Income + Net Liquid Assets			\$1000.00 \$0.00	
	- Extraordinary Expenses			\$45.00	
	MODIFIC ADUSTED LODIES INC.			****	
	Monthly Adjusted Gross in				
	Annual UMDAP Amount			\$99.00	
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- 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

Share of Cost Family ATP Income	Source Health Information
Family ATP	ATP Adjustn
Effective Dates Family Ability To Pay ATP Adjustment Total Current Paid Total Current Billed (ETP) Total	01/01/2020 - 12/31/2020 \$63.00 - \$0.00 - \$0.00 - \$0.00
Adjusted Family Ability To Pay	\$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 P	ayments Cash	Receipts Electro	onic Payments Statu	s Reader				
Lookup		Invoice			11/01/2020					
Transaction Date Procedure Consumer Service ID	11/01/2 03 - MH 218311	1020 I Case Manage 1	ement		Charge Transaction Service Date	s ID e	\$293.40 5578433 11/01/20	20	Provider Program	Fritz, Child
Payor		Charge	Paid	Adjusted	Transaction Date	Receipt Number	EOB Approval Date	Check Number	Туре	
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]	1	-	<b>-</b> -	\$20.00	12/10/2020				ADJ: Manual ETP Trans	sfer
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 Paym	ent
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 Incor	ne Source	Health Information	Heal					
Family ATP	ATP Adjustmer							
Effective Dates	01/01/2	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 I	Day	\$43.00						

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





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:

Receive Payments Batch Receive Payments	Refunds A	uto Receive Pa	ayments Cash	Receipts Electro	onic Payments	Status Reader				
Lookup		Invoice			11/02/202	20				
Transaction Date Procedure Consumer Service ID	11/02/20 03 - MH 2183112	)20 Case Manage 2	ement		Charge Transae Service	ctions ID Date	\$293.40 557843 11/02/2	4 020	Provider Program	Fritz, Chilo
Payor		Charge	Paid	Adjusted	Transaction Date	Receipt Number	EOB Approval Date	Check Number	Туре	
Medi-Cal MHS [10]		\$0.00	\$193.40	\$100.00						
[Detail]		-	-	-	12/10/2020				Charge Schedule Rat	te
[Detail]		-	\$193.40	-	12/10/2020		12/10/2020		Payment	
[Detail]		-	-	\$100.00	12/10/2020				ADJ: Manual ETP Tra	ansfer
Guarantor - Quatre, Henri [70944]		\$0.00	\$43.00	\$0.00						
[Detail]		-	-	-	12/10/2020				Charge Schedule Rat	te
[Detail]		-	-	\$193.40	12/10/2020		12/10/2020		ADJ: Prior Payor Pay	ment
[Detail]		-	-	\$57.00	12/10/2020				ADJ: Ability To Pay	
[Detail]		-	\$43.00	-	12/10/2020				Payment	
Alternate		\$0.00	\$0.00	\$0.00						
TOTAL		\$0.00	\$236.40	-						

vii. The Current ATP is down to \$0.00.

Share of Cost Family ATP Income	Source Health Information Hea
Family ATP	ATP Adjustment
Effective Dates	01/01/2020 - 12/31/2020
Family Ability To Pay	\$63.00
ATP Adjustment Total	- \$0.00
Current Paid Total	- \$63.00
Current Billed (ETP) Total	- \$0.00
Adjusted Family Ability To Pa	y \$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.

Lookup		Invoice			11/03/2020	)				
Transaction Date Procedure Consumer Service ID	11/03/2 03 - MH 218311	020 I Case Manag 3	ement		Charge Transac Service	tions ID Date	\$293.40 557843 11/03/2	5 020	Provider Program	Fritz, Child
Payor		Charge	Paid	Adjusted	Transaction Date	Receipt Number	EOB Approval Date	Check Number	Туре	
Medi-Cal MHS [10]		\$0.00	\$173.40	\$120.00						
[Detail]		-	-	-	12/10/2020				Charge Schedule	Rate
[Detail]		-	\$173.40	-	12/10/2020		12/10/2020		Payment	
[Detail]		-	-	\$120.00	12/10/2020				ADJ: Manual ETP	<sup>o</sup> Transfer
Guarantor - Quatre, Henri [70944]		\$0.00	\$0.00	\$0.00						
[Detail]		-	-	-	12/10/2020				Charge Schedule	Rate
[Detail]		-	-	\$173.40	12/10/2020		12/10/2020		ADJ: Prior Payor	Payment
[Detail]		-	-	\$120.00	12/10/2020				ADJ: Ability To Pa	ay
Alternate		\$0.00	\$0.00	\$0.00						
TOTAL		\$0.00	\$173.40	-						