Health Care Agency	Section Name:	Administration
Behavioral Health Services	Subsection:	Billing & Reimbursement
Policies and Procedures	Section Number:	04.02.01
	Policy Status:	☒New ☐Revised

	SIGNATURE	DATE APPROVED
Chief of Operations Behavioral health Services	_______________	____________________

SUBJECT: Office Support Staff Involvement with Verifying Financial Information

PURPOSE:

For front office support staff to assist in ensuring that every client receives a financial evaluation upon admission to the clinic, when a change in financial status is identified which may affect their current status, or when a financial re-evaluation is due.

POLICY:

It is the policy of Behavioral Health Services that the financial status of each consumer shall be checked and updated at each visit to an outpatient clinic.

SCOPE:

This P&P applies to all Behavioral Health Services (BHS) support staff in any program location where services are provided to clients.

DEFINITIONS:

Financial Evaluator:

That person authorized by chain of command and appropriately trained to conduct financial evaluations for BHS clients. This function may be provided by staff in any of several support staff job titles.

PROCEDURE:

I. Duties of the Front Office Support Staff:

A. For the client who is currently open in the Program Location

1. The front office support staff greets the client when the client enters the clinic and views or prints out the client's financial face sheet from IRIS.

2. The front office support staff will review the information on the financial face sheet and verbally confirm with the client that the information is

correct and whether or not there have been any changes in the information since the client's last appointment.

3. The front office support staff will log on to the Medi-Cal Web page to verify that those clients with Medi-Cal are eligible for the current month.

4. If no change is noted in the client's financial status, the office staff will notify the clinician that the client is ready for the appointment.

5. If the client's financial situation has changed, the front office support staff will notify the clinician and the financial counselor that an updated financial is needed.

6. The front office support staff will ask the clinician if the client should see the financial counselor before the appointment (this is the preferred practice).

7. If the clinician indicates that the client should see the financial counselor before the appointment, the office support staff will notify the financial evaluator that a financial update is needed before the clinician sees the client.

8. When a financial is required, the office staff may need to work with the clinician to re-schedule the appointment.

9. If the clinician indicates that the client will be seen first by the clinician, the clinician is then responsible to walk the client to the financial evaluator's office to meet with him/her following their session. If a financial cannot be done the same day, the clinician is responsible to help the client schedule an appointment with the financial evaluator. It will be the financial counselor's responsibility to follow up with the appointment.

10. Any time the client is unable or unwilling to participate in confirming or discussing the financial status, the Officer of the Day/On-Duty (OD)/clinician will be notified. The Officer of the Day/On-Duty (OD)/clinician will educate the client on the importance of following through with this financial, facilitate completion of the financial information and document in the chart accordingly.

B. For the Client who is not open in the Program Location

1. When a new client enters the clinic, the front office support staff greets the client.

2. The support staff will give the client the Division's initial forms to complete; i.e., the Intake/Registration forms, the Problem Statement/Medical History Summary, BHS Financial Evaluation form, etc.

3. The office support will notify the Officer of the Day/On-Duty (OD)/clinician that a client is in the lobby filling out paperwork.

4. The Officer of the Day/On-Duty (OD)/clinician will review the paperwork and assess if the client is able to meet with the financial counselor before the session (preferred practice) or needs to complete the session with the clinician before the financial evaluator.

5. Based on the visible assessment of the client and the situation, the Officer of the Day/On-Duty (OD)/clinician may accompany the client during the financial evaluation.