

Menu Item #12 – Financial Information

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Financial Information Entry

This screen is used to enter funding sources, target populations, Etc. First you have to specify the client again. Then click on Financial Information Entry.

Responsible Party Information:

First: Middle: Last:

Relationship to Client: ? Uncle

Address Line 1: Address Line 2:

City: State: ? North Carolina Zip Code: ? NC Jackson

Phone Number: Alternate Phone Number:

Billing Diagnosis Code:

Diagnosis: ? 311 DEPRESSIVE DISORDER NEC

IPRS Information:

Health Related Code:

Next

Exit

When entering information, please **DO NOT** enter any punctuation in the Client's Name and Address fields.

For example:

No Periods in "Main St." = Main St

No Pound signs in APT # 7 = Apt 7

No Apostrophes in "Jone's Cove Rd" = Jones Cove Rd

No Dashes in Zip Codes - 28779-0000 = 287790000

No Commas in "RT3, BOX10" = RT 3 Box 10

All punctuation has to be manually removed before we can bill claims to IPRS. Click Admission form to admit your client then click Add/Update Admission Data. At this point, you have to opportunity to enter responsible party info, a diagnosis which SMC would use for billing and an IPRS Health Code which the state collects. The IPRS code tells the state if they use tobacco or other substances. The diagnosis should pull from the PCP Admission if that has already been done. Then click **Next**.

Third Party Insurance: 1

This section is not for IPRS state funds. For IPRS state funds, please exit and select Target Pop Display and Entry. Private pay does not require an entry in this screen. If Uncoded Insurance 48 or 49 are chosen, click submit to get a prompt for the insurance company name.

Company Name: ? First Comercial Insurance

Policy Number:

Group Number if Applicable:

Address:

City:

State: ? NORTH CAROLINA

Zip: ? NC Jackson

Phone Number:

Insured's First Name:

Insured's Middle Initial:

Insured's Last Name:

Insured's Name Suffix: ?

Insured's Date of Birth: ?

Insured's Gender: ? MALE

Insured's Place of Employment:

Relation to Insured: ? SELF

Coverage Effective Date: ?

Coverage Lapse Date: ?

This screen allows you to enter third party insurance information for the client, Medicare, Medicaid, Etc. However it will not show up in the client's eligibility immediately. The system saves this data in a temporary location until our A/R staff review it. Then, A/R staff usually approve it the next day. If they approve it, it will show up under **Display Third Party Insurance** within 24 hours. Notice you get the opportunity to enter multiple layers of Third Party Insurance here. After you submit the first layer, the counter at the top of the screen increments until you click exit.

Target Pop Display and Entry

County of Residence: SWAIN

| Target Pop: | Start Date: | End Date: |
|--------------------------------------|-------------|------------|
| AMSMI AMSMI AMH W/SERIOUS MENTAL ILL | 02/01/2008 | 01/31/2009 |
| AMSMI AMSMI AMH W/SERIOUS MENTAL ILL | 10/30/2006 | 10/29/2007 |
| AMSPM AMSPM AMH SEVERE PERSISTNET MI | 08/09/2004 | 08/08/2005 |
| AMSMI AMSMI AMH W/SERIOUS MENTAL ILL | 12/20/2003 | 08/08/2004 |
| AMSMI AMSMI AMH W/SERIOUS MENTAL ILL | 12/20/2002 | 12/19/2003 |

Add a New Target Pop:

Start Date: ?

End Date: ?

Note: target pops are typically good for one year.

The target pop entry screen gives you the opportunity to enter the county of residence at the top if it does not already exist. Then it shows you any currently entered target populations with effective and lapse dates. It also gives you the opportunity to enter another new layer. In order to do this you must use an IPRS target population from the state located at:

<http://www.dhhs.state.nc.us/mhddsas/iprsmenu/index.htm>

Typically, target pops are good for one year. Make sure you do not overlap dates as these target pops are directly tied to funding sources. The last two menu items are for displaying target pops and fund sources.

This screen will not show more than two years of prior target population history.

Special Note: As of March 2009, If there is a current target population displayed, the screen will not show the text fields and allow you to enter a new target population, effective or end date. Updates to target populations will be displayed on your BUI To Do List 120 days prior to the end date.

For Example: If the target population due date is in December 2009 it will start showing up on your To Do List in September 2009 to give you 120 days to enter a new one. Refer to your **BUI To Do List** as a reminder.