The County of San Bernardino
Department of Behavioral Health

Clinic Responsibility for Processing Client Registration and Financial Information (PFI) Procedure

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Policy

Department of Behavioral Health (DBH) clinics will be responsible for completing the Client Registration and the Appointment Scheduler. Clinics will also be responsible for completing Financial Screening to ensure revenue for service.

Purpose

To establish DBH procedures and processing client information and services rendered data affecting billing practices.

Definition

New Client: Clients who have no medical record numbers in SIMON.

Registration Procedure

The following procedures apply to client Data. Detailed instruction for any SIMON input is located in the SIMON Manual.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The assigned Office Assistant (OA) will determine if the client is new or returning by entering the client's name and/or social security number into the SIMON locator screen.
<table>
<tr><th>If...</th><th>Then...</th></tr>
<tr><td>New Client</td><td>Register the client in SIMON.</td></tr>
<tr><td>Returning Client</td><td>Request client ID card.</td></tr>
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<tr><td>2</td><td>The assigned OA will prepare the Registration form or enter the client information directly into the SIMON Registration screen, using the client's legal name.</td></tr>
<tr><td>3</td><td>The assigned OA will ensure the client legal name matches client insurance information, i.e.; Medi-Cal, Medicare, or private insurance.</td></tr>
<tr><td>4</td><td>The SIMON system will issue a medical record number for the client after the registration data is input.</td></tr>
<tr><td>5</td><td>The assigned OA will input the Proof of Eligibility (POE) and obtain the eligibility verification code number.</td></tr>
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Registration Procedure (continued)

Step	Action
6	The assigned OA will photocopy and forward to the Financial Interviewer the client's: • Medi-Cal card • Client I.D. • Insurance Card • Medicare Card

Financial Interview Procedure

The following procedure will be following for obtaining client financial information.

Step	Action
1	The assigned OA will refer the client to the Financial Interviewer after the client registration process is complete and input to SIMON.
2	The Financial Interviewer will complete a financial interview by telephone except when the assigned OA calls the Financial Evaluation office and advises that an interview is needed.
3	The assigned OA asks the client to be seated in the lobby to await the Financial Interviewer.
4	The Financial Interviewer will conduct the interview and return the client to the lobby.
5	The Financial Interviewer will input the client code and expiration date to SIMON.
5	The Financial Interviewer will provide the required financial information, including the client code and expiration date, to the assigned OA what documents are needed once the interview is completed.
6	The assigned OA will complete the following documentation if the Financial Interviewer has not already done so: • Obtain signatures • Complete the client payment agreement • Complete the I.D. card information • Complete needed Medicare forms and any other forms requested by the interviewer for billing
7	Assigned OAs will arrange for future Financial Interviews, using the SIMON MH 164 Report, when there is any change in the client's income or dependents or there is a liability date expiration or if it will expire within forty-five (45) days.

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Appointment Roster Information	The Appointment Roster (AR) provides the formal documentation for reporting and billing services provided to clients and is the Charge Data Invoice (CDI). These forms are used to document the services entered into SIMON. ARs and CDIs must be stored by each clinic until all audits are completed and there are no appeals in progress. The Fiscal Section will notify clinic supervisors in writing of audit completions, when they can be shredded.
Related Policy or Procedure	DBH Standard Practice Manual CLK0704: Charge Data Invoice (CDI) Process Procedure DBH Standard Practice Manual QM6016: Procedures for Submission of Chart Documentation and Charge Data Invoices (CDIs)