CBO Bulletin

PAYER FINANCIAL INFORMATION FORM (MH-281) UPDATED

The California Department of Health Care Services requires the collection of reimbursement for services from private or public third-party payers and from clients, as appropriate (Welfare and Institutions Code 5872). Clients receiving mental health services must be financially screened to determine their ability to pay for services. Providers operated by or contracted with the Los Angeles County Department of Mental Health (DMH) use the Payer Financial Information (PFI) form to fulfill these requirements.

This Bulletin is to announce that the PFI has been updated. Outdated information has been removed to make room for new fields that will allow users to capture information regarding special client populations and third-party payers. Below is a list of some of the changes made to each part of the PFI.

| PFI Part | Lines/Boxes | Description of Changes |
|----------------------------------|-------------------------|---|
| Client Information | 1-4 | Added Family Registration field Added row to identify Special Populations Moved Provider of Financial Information field to the top of the form |
| Third-Party Information | 5-11 | Removed fields for AB3632, CalWORKs, HWLA Added field for ECM Plan Name Added rows to document another private insurance Added fields to note that insurance coverage is Medicare Advantage |
| Payer References | 12-20 | Updated ID field to allow for other forms of identification |
| UMDAP Liability Determination | Boxes 21-23, Line 24 | Changed Box numbers Clarified label for Number Dependent on Income |
| Other | 25-28 | Updated Reason Adjusted field for adjustments to the annual liability Added checkboxes for TFA and Other reasons Added instruction to enter the date the client signed the TFA in the Reason Adjusted field |



Detailed instructions on completing the revised PFI are provided in the updated Financial Screening Manual. The revised PFI is dated September 1, 2023. The updated Financial Screening Manual scheduled to be released in the coming weeks will have an October 1, 2023, revision date.

The PFI is available for use as of the date of this Bulletin. Begin using this revision for all clients needing an initial financial screening or reevaluation on or after September 1, 2023. Agencies integrating the PFI into their Electronic Health Record (EHR) or claiming system must have the form available for use no later than January 1, 2024. Clients who have a current PFI on file will not need to have their form updated until the expiration of their current annual charge period or until the client has experienced financial or insurance changes that require a review of their annual liability.

Please note, signatures on the PFI can be written out by hand, electronic, or digital. Verbal consent is not allowed on the PFI or any financial form.

An image of the new PFI is below. A fillable version of the revised PFI is attached to this Bulletin and will be posted online with Central Business Office (CBO) Bulletins: <u>Central Business Office (CBO) Bulletins - Department of Mental Health (lacounty.gov)</u>.





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