

DMH'S FINANCIAL SCREENING MANUAL UPDATED

The Los Angeles County Department of Mental Health (DMH) has revised the Financial Screening Manual. The Financial Screening Manual is used by all DMH directly operated and contracted providers to guide the financial screening of clients.

The Manual provides instruction on the information collected during the initial and subsequent financial screening interviews that goes into the client's financial record and determines the client's financial responsibility. It covers completing the Payer Financial Information (PFI) form, reviewing related agreements and insurance authorizations that the client may have to sign, requesting and reviewing supporting verification, and when to initiate a re-evaluation. This updated version of the Financial Screening Manual is organized into chapters on the Uniform Method of Determining Ability to Pay (UMDAP), Financial Screening, Completing the PFI, Medi-Cal, Third-Party Payers, and includes new features such as Sample PFIs and new sections on TRICARE and CHAMPVA, Victims of Crime coverage, Verification of Identity and Financial Information, and updated forms in the Forms Appendix.

The Financial Screening Manual is attached to this Bulletin and is also available on the DMH website. The Manual can be accessed from the page where Central Business Office (CBO) Bulletins are located. It is located in the [CBO Financial Forms](#) folder along with the updated PFI, the UMDAP Fee Schedule, and other forms used during financial screening.

Central Business Office (CBO) Bulletins

- Administrative Info
- Provider Manuals & Directories
- Policies, Parameters & Guidelines
- Administrative Forms
- CBO Financial Forms**
- CBO Financial Forms

<https://dmh.lacounty.gov/for-providers/cbo-financial-forms/>

CENTRAL BUSINESS OFFICE (CBO) BULLETINS

Current and archived Central Business Office Dispatches Bulletins (and the formerly named Revenue Management Division Bulletins) are posted below

- [Central Business Office \(CBO\) Dispatches Bulletins 2023](#)
- [Central Business Office \(CBO\) Dispatches Bulletins 2023 - Trainings](#)
- [Central Business Office \(CBO\) Dispatches Bulletins 2022](#)
- [Central Business Office \(CBO\) Dispatches Bulletins 2022 - Trainings](#)
- [Central Business Office \(CBO\) Dispatches Bulletins 2021](#)
- [Central Business Office \(CBO\) Dispatches Bulletins 2021 - Trainings](#)