

CBO Bulletin

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PAYER FINANCIAL INFORMATION AND FINANCIAL PROFILE VERIFICATION REQUEST NOW AVAILABLE AS DUAL LANGUAGE FORMS

The updated Payer Financial Information (PFI) and the Financial Profile Verification Request checklist used during financial screening and presented in the current Financial Screening Manual are available in English and in Los Angeles County’s 13 threshold languages. Dual-language versions of the PFI are now available to help ensure that what is being documented during the financial screening interview is understandable to all participants. The Financial Profile Verification Request checklist is also available as a dual-language form so clients can see what is needed to complete the financial screening in their own language.

Dual-language forms are single documents in both English and one of the threshold languages. The dual-language versions allow users to enter information in one of the form’s languages and have it populate the corresponding field in the threshold language automatically, at the same time. For example, in the English-Spanish version of the PFI, when the client’s name is entered on the English page, the name will appear in the Name field on the Spanish page after tabbing to the next field. See below.

PFI – English Version

CLIENT INFORMATION		PAYER FINANCIAL INFORMATION				CONFIDENTIAL CLIENT INFORMATION See W & I Code, Section 5328	
1	CLIENT NAME John Smith	SS # 999-99-9999	DMH CLIENT ID #	FAMILY REGISTRATION #			
2	MAIDEN NAME	DOB 11/18/2000	MARITAL STATUS <input checked="" type="checkbox"/> M <input type="checkbox"/> S <input type="checkbox"/> D <input type="checkbox"/> W <input type="checkbox"/> SP	SPOUSE/PARTNER/SIGNIFICANT OTHER'S NAME Jane Smith			
3	FOSTER CARE <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	VICTIMS OF CRIME <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	VETERAN <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	WORKER'S COMP <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	HOMELESS <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	CALWORKS <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	OTHER SPECIAL POPULATION: N/A

PFI – Spanish Version

INFORMACIÓN DEL CLIENTE		INFORMACIÓN FINANCIERA DEL PAGADOR				INFORMACIÓN CONFIDENCIAL DEL CLIENTE Consulte el código W&I, sección 5328	
1	NOMBRE DEL CLIENTE John Smith	N.º de SS 999-99-9999	N.º DE IDENTIFICACIÓN DEL CLIENTE DMH	N.º DE REGISTRO FAMILIAR			
2	APELLIDO DE SOLTERA	FECHA DE NACIMIENTO 11/18/2000	ESTADO CIVIL <input checked="" type="checkbox"/> C <input type="checkbox"/> S <input type="checkbox"/> D <input type="checkbox"/> V <input type="checkbox"/> SP	NOMBRE DEL CÓNYUGE/PAREJA/PAREJA DE HECHO Jane Smith			
3	CUIDADO TUTELAR <input type="checkbox"/> SÍ <input checked="" type="checkbox"/> NO	VÍCTIMA DE DELITO <input type="checkbox"/> SÍ <input checked="" type="checkbox"/> NO	VETERANO <input checked="" type="checkbox"/> SÍ <input type="checkbox"/> NO	INDEMNIZACIÓN LABORAL <input type="checkbox"/> SÍ <input checked="" type="checkbox"/> NO	PERSONA SIN HOGAR <input type="checkbox"/> SÍ <input checked="" type="checkbox"/> NO	CALWORKS <input type="checkbox"/> SÍ <input checked="" type="checkbox"/> NO	OTRAS POBLACIONES ESPECIALES: N/A

Note 1: Tab through fields to populate the corresponding field in the other language.

Having the forms in both English and one of the threshold languages allows clients to review forms in their preferred language as financial operations staff update the English version of the form. The forms are available for immediate use. They are posted on the CBO Financial Form page of the Los Angeles County Department of Mental Health website: [CBO Financial Forms – Department of Mental Health \(lacounty.gov\)](https://lacounty.gov/cbo-financial-forms).

Clients should sign the version of the form that is in their preferred language only. Signatures will not populate to the other language, but there is no need to capture the signature on both versions. Once signed, give the client a copy of the form in both languages and place both versions of the form into the client's financial record.