

## Client Liability

### 458A/458AN:

- Staff will continue sending a 458A or a 458AN with the current and corrected financial statements to clients/authorized reps and facilities.

### Searching for Liability:

- Log into MMIS
- Select Recipient > Search
- Enter the Prime in the Client ID field
- Hit Search (or just click Enter)
- IF multiple lines appear click ANY line to enter Recipient Information Panel
- Scroll down to the Recipient Maintenance box
- Click on Patient Liability
- Scroll down to the Patient Liability Panel.
- You can sort by any of the four category types: Monthly Amount, Type, Effective Date, and End Date by click on them.
- Click on a line to view Liability details and to modify.

### Modifying a Liability Line:

**EXAMPE:** This is an example of what you may see on MMIS and how to change it:

#### Existing Record:

Monthly amt	Type	Effective Date	End Date
\$100	PO	2/1/2008	8/31/2008
\$150	PO	9/1/2008	12/31/2299

Change Record so client does not have to pay liability in October 2008:

#### Modified Record:

Monthly amt	Type	Effective Date	End date	Notes
\$100	PO	2/1/2008	8/31/2008	No change
\$150	PO	9/1/2008	9/30/2008	End line with day of month to pay liability
\$150	NL	10/1/2008	10/31/2008	New line with NL For no liability In October
\$150	PO	11/1/2008	12/31/2299	New line to Resume liability After October.

All lines can then be saved.

- THIS IS FOR TEMPORARY CHANGES TO LIABILITY (such as initial month of placement) ALL ONGOING CHANGES TO LIABILITY AMOUNTS SHOULD BE DONE THROUGH ACCESS/UCMS.
- Go to the Patient Liability Panel (see Search for Liability section on how to get here).
- Select the line item that you want to modify
- Four fields should become available:
  - Month Amount
    - Patient's financial liability amount that must be paid by the recipient.
  - Type
    - Indicates which program to apply patient obligation to. Most often you will be using MS, PO, and NL. The other types will most often not be used in the field.
      - BR - Budget Reduction – the total allocation available for Plan of Care planning is reduced.
      - CC - Client Contribution – refers to the amount that must be paid monthly as a condition of eligibility for the EPD program. This contribution is the combination of the Cost Share and the Premium (Rule 461-110-0115)
      - NL - No Liability – this situation has no client liability
      - PI - Pay-In – the client pays into a DHS account that is used through a vendor application process to reduce the cost of claims
      - PO - Provider Offset – the client and provider receive statements explaining the amount the client must pay the provider. The amount offsets the provider payment.
      - PR - Payment Reduction – used when the client is receiving a benefit through a direct client payment
      - MS - Client Liability is not applied in the SPD MMIS subsystem. This liability information is informational only in the core MMIS
  - Effective Date
    - Date that the patient's financial liability amount becomes effective.
  - End Date
    - Date that the patient's financial liability amount is no longer effective.
- Modify the necessary fields
  - Example(s):
    - 1) If you have a new PO liability showing from 6/13/09 to 12/31/2299 for someone that just entered the NF and they

already spent their liability amount at their previous placement, you can click on that line, change the Type to NL, and change the End Date for the end of the month 6/30/09. You will need to go in and then add another line for an ongoing date liability for the correct amount from 7/1/09 to 12/31/2299.

- 2) If you have an ongoing PO liability from 1/1/09 to 12/31/2299 for someone in the NF and they should not have a liability for a period of 1 month (March). Then you can go in and end the current line for 02/28/09. ADD a new Line and with the calculated liability amount for Monthly Amount, Type NL, Effective Date 3/1/09, and End Date of 3/31/09. You can then ADD another Line to resume ongoing liability by putting the correct liability back on for 4/1/09 with and End Date of 12/31/2299. You can also go into ACCESS and do an action to carry over the liability to MMIS for that date (compute) if you are in the time frame.

**NOTE(s):** You should go through ACCESS/UCMS any time there is a change of income that will affect the liability, MMIS should just be used for Temporary changes in liability. Using the NL liability type code allows you to continue to record the CMS calculated liability amount, however, allows the system to note that it is not to be applied for the designated month.

- Go up to the Recipient Maintenance Panel and click Save.
- You should see a message that states: Save was Successful

#### Changing Previous Liability Amounts:

- **NOTE:** You DO NOT need to do this for providers at this time, they should be billing using the 458A (458AN) and the billing procedures outlined for them, however, this is the process for adjusting for a section of liabilities.
- Go into the Patient Liability Panel
- Locate the line that contains the period of previous liability that you need to change.
- Click on that line.
- MMIS will refresh and details should appear below.
- If the liability change is for the whole period (covering from the selected effective date to end date) on that specific line, change the necessary field(s).
  - **Ex.** Liability Line running from 6/1/08 to 12/31/08, Type: PO, Monthly Amount: 323.00. Actual liability for that period should have been 270.00; you have sent a 458A with that information to facility and have a copy in file, then change the Monthly Amount to 270.00.
- If the liability change is for part of the period (covering a section of time between the effective date and end date) on that specific line, determine how many periods or lines there should be with the different liability amounts and types.
  - **Ex.** Liability Line running from 6/1/08 to 12/31/08, Type: PO, Monthly Amount: 323.00. 6/1/08 to 6/30/08 should be a PO for 323.00 due to a

lump sum payment, 7/1/08 through 9/30/08 should have been 270.00, PO ongoing, 10/1/08 should have been NL until 10/31/09, and 11/1/08 should have been 270.00 until 12/31/08.

- Change the end date on the current line (was 12/31/08) to 6/30/08.
  - Click add.
  - A blank liability line should appear.
  - Fill in the next Monthly Amount: (270.00)
  - Fill in the Type: (PO)
  - Fill in the Effective Date: 7/1/2008
  - Fill in the End Date: 9/30/2008
  - Click add
  - A blank liability line should appear
  - Fill in Monthly Amount: (270.00) (Note: Leave ongoing amount in this line).
  - Fill in Type: NL
  - Fill in Effective Date: 10/1/2008
  - Fill in End Date: 10/31/2008
  - Click add
  - A blank liability line should appear
  - Fill in Monthly Amount: (270.00)
  - Fill in Type: PO
  - Fill in Effective Date: 10/1/2008
  - Fill in End Date: 12/31/2008
- Go to the Recipient Maintenance Panel and click Save.

#### Overlapping Liability Lines:

MMIS may show multiple lines overlapping; this is because the MMIS interface allows for overlapping liability segments when the type is different. Therefore, the liability section may have a MS liability from 5/1/09 to 12/31/2299 and a PO liability starting 6/1/09 to 12/31/2299. You will need to fix this overlap.

- Go into the Patient Liability Panel
- Select the line item that needs to be ended (that is overlapping).
- Add the appropriate End Date (So, for our example you would end the NL liability for 5/31/09).
- Go up to the Recipient Maintenance Panel and click Save.