

Base Account – Manage Client Fees in SCRAM 24/7



Purpose

Use this quick sheet to view and manage a client's fees using SCRAM 24/7.

Procedure

Tasks related to managing fees include:

- Viewing a client's financial status.
- Adjusting a fee.
- Waiving a fee.

View Client's Financial Status

1. Log in to SCRAM 24/7.
2. Click the **Financials** top-navigation option.
3. Click the **Clients** tab.

The *Clients* page appears.

The screenshot shows the SCRAM 24/7 interface. At the top, there is a navigation bar with 'Clients', 'Financials', 'Admin', 'Reports', and 'Optix'. Below this is a sub-navigation bar with 'Summary', 'Disbursements', and 'Clients'. The main content area is titled 'Search All Clients' and contains a search form with the following fields: 'Last Name' (value: david), 'First Name' (value: larry), 'Identification Number' (placeholder: System ID number or any other form of ID), and 'Include Inactive Clients' (checkbox). Below the search form is a 'Search Results' section with a table. The table has columns for 'Client', 'Enrolling Site', 'DOB', 'Identification', and 'Status'. The first row shows a client named 'David, Larry' with an enrolling site of 'Douglas', a DOB of '8/7/1903', an identification of 'System ID: YRXC-P3MF', and a status of 'Active'. Red boxes highlight the search filters and the client name in the results table.

Client	Enrolling Site	DOB	Identification	Status
David, Larry	Douglas	8/7/1903	System ID: YRXC-P3MF	Active

4. Enter the client's first and last name.
The client is automatically listed in the Search Results section.
5. Click the client name link.

Base Account – Manage Client Fees in SCRAM 24/7

The client's financial information appears.

The screenshot shows the SCRAM 24/7 interface for a client named David, Larry. The page is divided into several sections:

- Client Profile:** Includes a profile picture, name, status (Active), DOB (August 7 1903), Enrolling Site (Douglas), and Home Phone ((605) 555-1111).
- Open Cases:** Lists case number 0987.
- Current Account Balances:** A table showing a single entry for 'UA Test Fee' at 'Douglas' with a 'Positive Balance' of \$0.00 and a 'Balance Due' of \$0.00. A 'Create Adjustment' button is visible.
- Client Status:** Shows 'Financial Status' as 'Normal' with an 'Edit' button.
- Fee Status:** Includes a dropdown menu for selecting an account.
- Transaction History:** A table with columns: Date/Time, Activity, Activity Fee, Type, Amount, Comment, Receipts. It shows three transactions: a refund of \$40.00, a payment of \$50.00, and a fee of \$10.00.

At any time, you can click the **Edit** button in the Client Status section to add a comment, such as the client is in collections or the client cannot be located. This information could help in the collection of any delinquent balance.

Adjust Fee

1. From the client's financial page, click the **Create Adjustment** button.

The *Client Activity Fee Adjustment* page appears.

The screenshot shows the 'Client Activity Fee Adjustment' page for David, Larry. The page contains the following fields and buttons:

- Test Site:** A dropdown menu with 'AddAccount' selected.
- Activity Fee:** A dropdown menu with 'CAM Activation' selected.
- Adjustment Amount:** A text input field containing '0.00'.
- Adjustment Reason:** A text area with the placeholder text 'Describe the reason this adjustment is necessary...'
- Buttons:** A 'Cancel' button and a green 'Apply Adjustment' button.

2. Select the client's test site.

Base Account – Manage Client Fees in SCRAM 24/7

3. Select the activity fee being adjusted.
4. Enter the adjustment amount.
5. Enter the reason for adjustment.
6. Click the **Apply Adjustment** button.

The adjustment appears in the Transaction History section.

The screenshot displays the SCRAM 24/7 interface for a client named David, Larry. The interface includes a navigation bar with 'Clients', 'Financials', 'Admin', 'Reports', and 'Optix'. The main content area is divided into several sections: 'Current Account Balances', 'Client Status', 'Fee Status', and 'Transaction History'. The 'Transaction History' table shows a recent adjustment entry for a CAM Activation fee, which is highlighted with a red box.

Activity	Activity Fee	Test Site	Positive Balance	Balance Due
CAM	CAM Activation	Douglas	\$5.00	
UA	UA Test Fee	Douglas	\$0.00	

Date/Time	Activity	Activity Fee	Type	Amount	Comment	Receipts
5/10/2018 @ 6:12 PM	CAM	CAM Activation	Adjustment	\$5.00	Client is having financial issues.	

Base Account – Manage Client Fees in SCRAM 24/7

Waive Fee

When a fee is waived, the client will NOT be charged for that fee until the fee is reactivated. To waive a fee:

1. From the client's status page located in the Financials section, select the account in the Fee Status drop-down list where the fee will be waived.

All fees for that account are listed.

The screenshot shows the SCRAM 24/7 interface for a client named David, Larry. The 'Current Account Balances' table lists two fees: CAM Activation (\$5.00) and UA Test Fee (\$0.00). The 'Client Status' section shows a 'Financial Status' of 'Normal'. The 'Fee Status' section has a dropdown menu set to 'Douglas' and a list of fees with checkboxes. A red box highlights the checkboxes for the first 12 fees. Another red box highlights the 'Waive Fee' button at the bottom right.

Activity Fee	Activity	Fee Status
<input type="checkbox"/> PBT State Fee	Breath Test	Fee Applied
<input type="checkbox"/> PBT Test Fee	Breath Test	Fee Applied
<input type="checkbox"/> Phone Line Fee	Breath Test	Fee Applied
<input type="checkbox"/> CAM Activation	CAM	Fee Applied
<input type="checkbox"/> CAM Daily Fee - Agency	CAM	Fee Applied
<input type="checkbox"/> CAM Daily Fee - State	CAM	Fee Applied
<input type="checkbox"/> CAM Deactivation	CAM	Fee Applied
<input type="checkbox"/> Drug Patch Install Fee	Drug Patch	Fee Applied
<input type="checkbox"/> Drug Patch Replacement Fee	Drug Patch	Fee Applied
<input type="checkbox"/> Interlock Inspection Fee	Interlock	Fee Applied
<input type="checkbox"/> Interlock Install Inspection Fee	Interlock	Fee Applied
<input type="checkbox"/> UA Test Fee	UA	Fee Applied

2. Select the check box for the fee being waived.
Note: Multiple fees can be waived simultaneously.
3. Click the **Waive Fee** button.

Base Account – Manage Client Fees in SCRAM 24/7

The status of the fee is now set to “Fee Waived.”

The screenshot displays the SCRAM 24/7 interface for a client named David, Larry. The interface includes a navigation bar with 'Clients', 'Financials', 'Admin', 'Reports', and 'Optix'. The main content area is divided into several sections:

- Activity Table:** Lists activities with columns for Activity, Activity Fee, Test Site, Positive Balance, and Balance Due. It shows two entries: CAM Activation and UA Test Fee, both at Douglas, with a positive balance of \$5.00 and a balance due of \$0.00.
- Client Status:** Shows Financial Status as Normal and a Comment field.
- Fee Status:** A dropdown menu is set to 'Douglas'. Below it is a table of fees with checkboxes, activity names, and fee status buttons.

Activity Fee	Activity	Fee Status
<input type="checkbox"/> PBT State Fee	Breath Test	Fee Waived
<input type="checkbox"/> PBT Test Fee	Breath Test	Fee Applied
<input type="checkbox"/> Phone Line Fee	Breath Test	Fee Applied
<input type="checkbox"/> CAM Activation	CAM	Fee Applied
<input type="checkbox"/> CAM Daily Fee - Agency	CAM	Fee Applied
<input type="checkbox"/> CAM Daily Fee - State	CAM	Fee Applied
<input type="checkbox"/> CAM Deactivation	CAM	Fee Applied
<input type="checkbox"/> Drug Patch Install Fee	Drug Patch	Fee Applied
<input type="checkbox"/> Drug Patch Replacement Fee	Drug Patch	Fee Applied
<input type="checkbox"/> Interlock Inspection Fee	Interlock	Fee Applied
<input type="checkbox"/> Interlock Install Inspection Fee	Interlock	Fee Applied
<input type="checkbox"/> UA Test Fee	UA	Fee Applied

At the bottom right of the Fee Status section, there are two buttons: 'Apply Fee' and 'Waive Fee'. The 'Apply Fee' button is highlighted with a red box.

At any time, you have the option to select the check box for the waived fee and click the **Apply Fee** button to reapply that fee.