CSI Correction Guide

Live Well San Diego

County of San Diego
Behavioral Health Services

CSI Correction Guide

Client Service Information, also known as CSI, must be submitted to the State. Just like with billing, it will land in suspense if the information is not correct. This guide is to be used in conjunction with the CSI Validation Report to correct the suspense items so they can successfully be submitted to the State.

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The errors included in this packet are only the most common error types. If you have any questions, or need additional support, please STOP and call the Optum Support Desk at 800-834-3792.

✓ **Error: Client's name contains non-alpha characters**

Client name should not have any non-alpha characters. This includes the first name, middle name, last name, and suffix. Non-alpha characters are apostrophes, hyphens, spaces, or non-English letters.

Example of a wrong name:

✓ **Correction: Submit a FORM A to update the name removing any non-alpha characters.**

Example of a correct name:

✓ **Error: Invalid Country of Birth**

The selections made within the 5 individual questions (2 radio buttons and 3 selections) MUST be logical.

Example of illogical selections:

✓ **Correction: Add a new Demographic Form, dated today's date, and update either the radio button, or selections so the selections are logical.**

Examples of logical selections:

Place of Birth Scenario 1 – Unknown Place of Birth
- Born in US: "NO"
- Born in CA: Will be grayed out
- Place of birth COUNTY: Will be grayed out
- Place of birth STATE: Will be grayed out
- Place of birth COUNTRY: 99 = Unknown Country

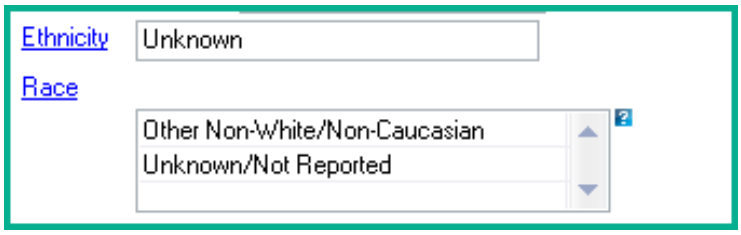
Place of Birth Scenario 2 – Know born in US but nothing else
- Born in US: "Yes"
- Born in CA: "No"
- Place of birth COUNTY: Will be grayed out
- Place of birth STATE: UN = Unknown State
- Place of birth COUNTRY: US = United States

Place of Birth Scenario 3 – Know born in US and CA but nothing else
- Born in US: "Yes"
- Born in CA: "Yes"
- Place of birth COUNTY: 99 = Unknown
- Place of birth STATE: CA = California
- Place of birth COUNTRY: US = United States

✓ **Error: Invalid Race Combination**

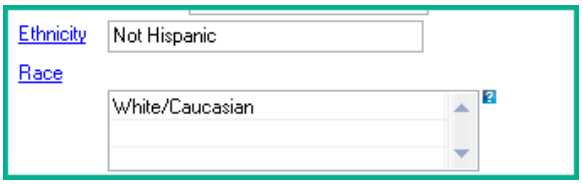
There cannot be a true value in conjunction with “Unknown/Not Reported.”

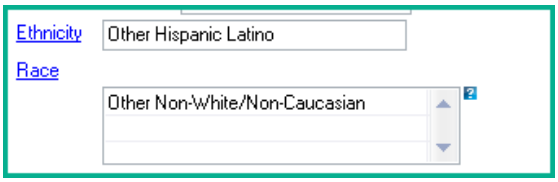
Example of illogical selection:



✓ **Correction: Add a new Demographic Form dated today’s date. If there are both an unknown value and a true value, delete the “Unknown/Not Reported.”**

Examples of logical selections:

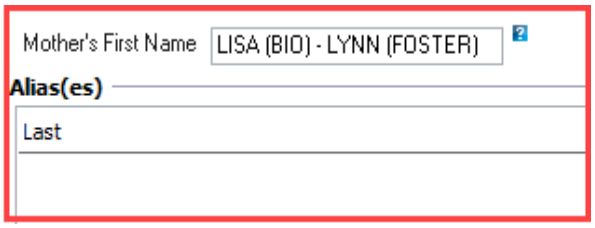




✓ **Error: Mother's name contains non-alpha characters**

Mother's name should not have any non-alpha characters. This includes apostrophes, hyphens, spaces, non-English letters, and parentheses.

Example of a wrong name:



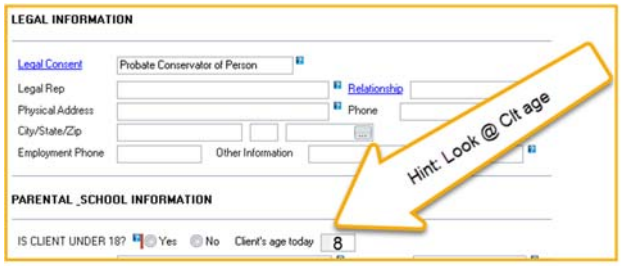
✓ **Correction: Add a new Demographic Form, dated today's date, and update the name removing any non-alpha characters.**

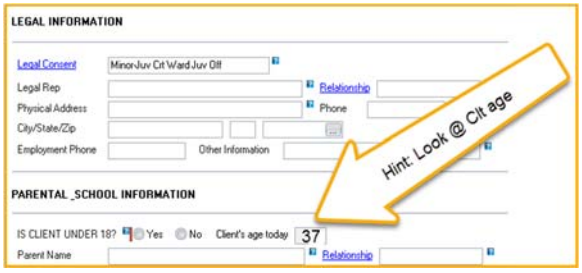
Examples of correct names:

✓ **Error: Invalid Legal Consent, Client is >17/Invalid Legal Consent, Client is >25**

The client's legal consent/conservatorship status MUST align with their current age.

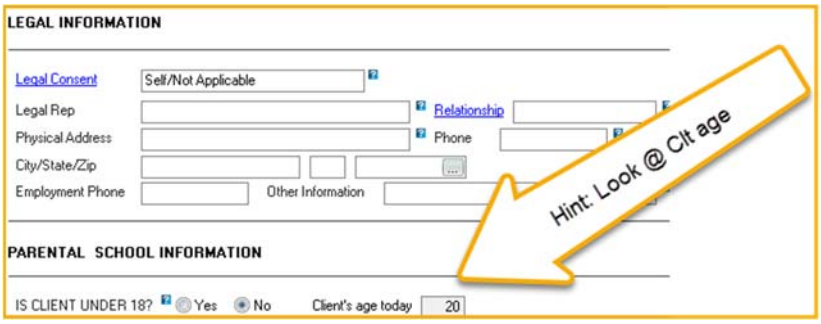
Examples of invalid legal consent:





✓ **Correction: Add a new Demographic Form, dated today's date, and update the legal consent field to be consistent with the client's age.**

Example of a valid legal consent:



✓ **Error: Under 18 was not selected but client is under 18/Under 18 is selected but client is >= 18**

The radio button asking if the client is under 18 MUST be answered correctly. The client's current age was recently added next to this question for ease of answering.

Example of incorrect selection:

✓ **Correction: Add a new Demographic Form, dated today's date, and update the radio button to be consistent with the client's age.**

Example of a correct selection:

✓ **Error: No principal MH Diagnosis**

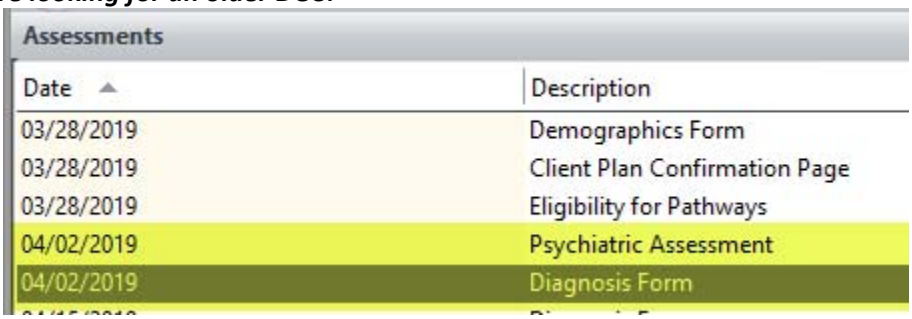
There several reasons this error will appear:

A. The date of the diagnosis form does not cover the actual date of service (DOS). Note: There has to be a diagnosis form with a form date on or before the DOS.
B. The start date of the mental health diagnosis does not cover the actual DOS. Note: There has to be a mental health diagnosis in effect on the DOS.
C. The diagnosis is not a mental health diagnosis. Note: The diagnosis covering the date of service MUST be mental health.

Error A: Example of the diagnosis FORM not covering the actual DOS:
The report states the DOS is 3/28/19:

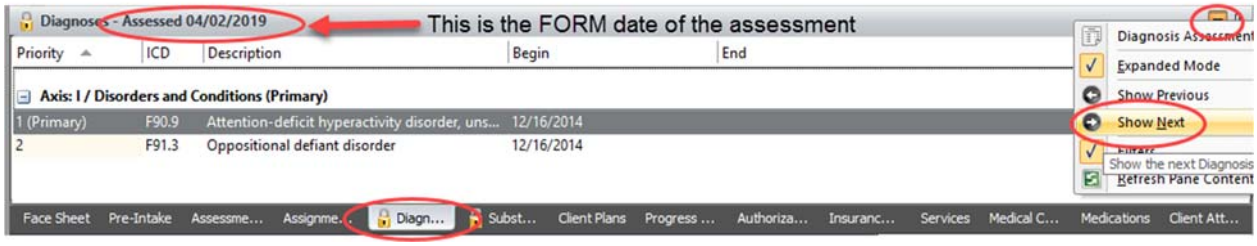
I	J	K	L	M
Record Type	Case Numbe	Client Name	DOS/ Form Da	Error Message
Service	[redacted]	[redacted]	3/28/2019	No Principal MH Diagnosis (Please enter a Mental Health diagnosis code in the Diagnosis form)

The client's chart reflects that the first diagnosis form entered was 4/2/19. ***Reminder: change your filters if you are looking for an older DOS.***



Reminder: A diagnosis form can be embedded in other assessments, such as the Psychiatric Assessment. You may also check the diagnosis pane to see form dates of assessments that include diagnoses.

Hint: When using "Show Next," a blank diagnosis screen will display in-between the most recent diagnosis and the very first assessment entered.

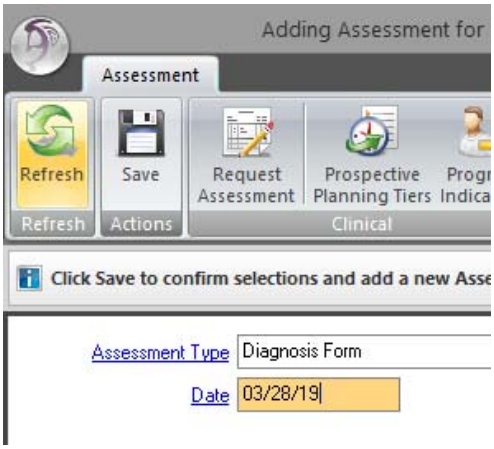


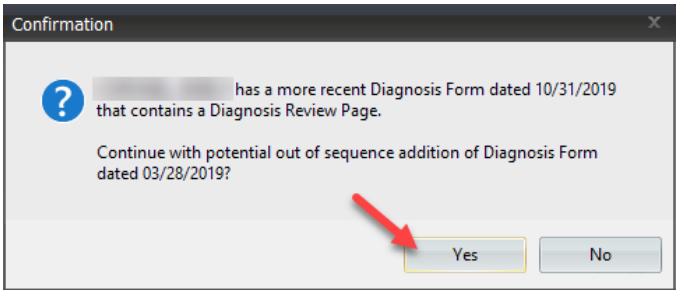
✓ **Correction A:**

1. **Add a new Diagnosis Form, dated the DOS.**
2. **Ensure there is a mental health diagnosis covering the DOS and final approve the form.**

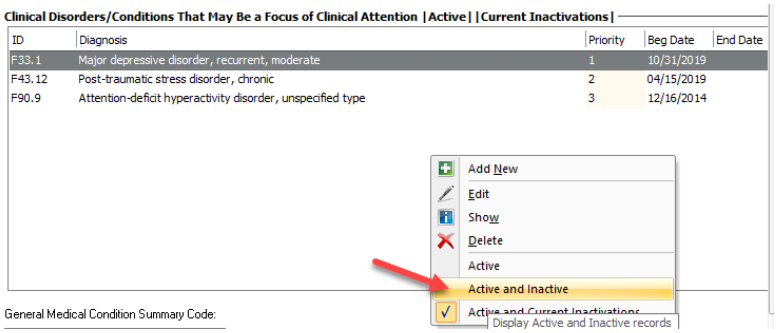
3. **If when a form is back dated a notification stating it was not the most recent diagnosis form appears, add a second diagnosis form, dated today's date, and make the same changes to it as the back dated diagnosis form.**

1. **Add a new Diagnosis Form, dated the DOS.**





Hint: It may be helpful to change your view to view all active and inactive diagnoses to be able to determine if there is a mental health diagnosis covering the DOS.



2. **Ensure there is a mental health diagnosis covering the DOS and final approve the form.**

Due to the fact the DOS is currently covered by both F90.9 and F91.3, both mental health diagnoses, just sign and final approve the assessment.

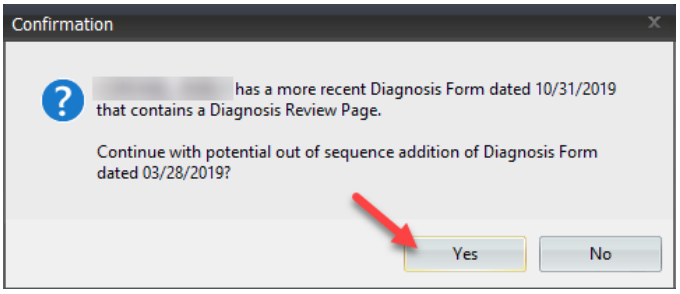
If there was not a mental health diagnosis to cover the DOS, either change the start date of an applicable diagnosis early enough to cover the DOS or enter in the deferred diagnosis. If a deferred diagnosis is used, both the begin and end date must be entered, as there are already valid diagnoses in this client's chart. [Reminder: NEVER change the start date to be a more recent date than what is already displaying].

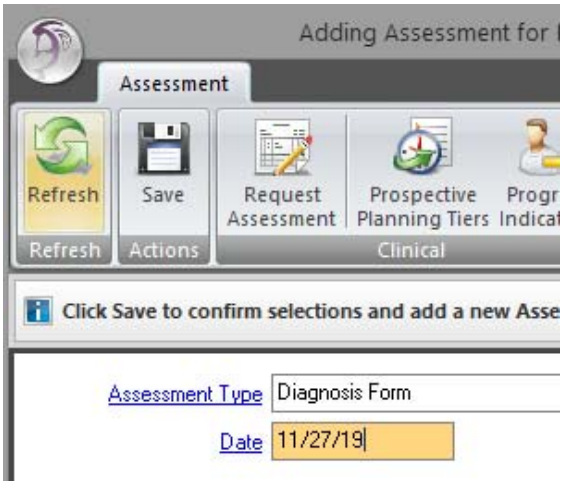
Clinical Disorders/Conditions That May Be a Focus of Clinical Attention | Active | | Inactive |

ID	Diagnosis	Priority	Beg Date	End Date
F43.12	Post-traumatic stress disorder, chronic	2	04/15/2019	
F33.1	Major depressive disorder, recurrent, moderate	1	10/31/2019	
F90.9	Attention-deficit hyperactivity disorder, unspecified type	3	12/16/2014	
F91.3	Oppositional defiant disorder	Inactive	12/16/2014	10/24/2019

3. **If when a form is back dated a notification stating it was not the most recent diagnosis form appears, add a second diagnosis form, dated today's date, and make the same changes to it as the back dated diagnosis form.**

When the back dated form was entered the notification displayed. Enter a new form dated today and make the same changes that were made in the back dated form.





No changes were made in the back dated form, as there was a mental health diagnosis that covered the DOS. Just sign and final approve the assessment.

Error B: Example of the diagnosis START DATE not covering the actual DOS:
The report states the DOS is 6/12/17

Record Type	Case Numbe	Client Name	DOS/ Form Da	Error Message
Service	[redacted]		6/12/2017	No Principal MH Diagnosis (Please enter a Mental Health diagnosis code in the Diagnosis form)

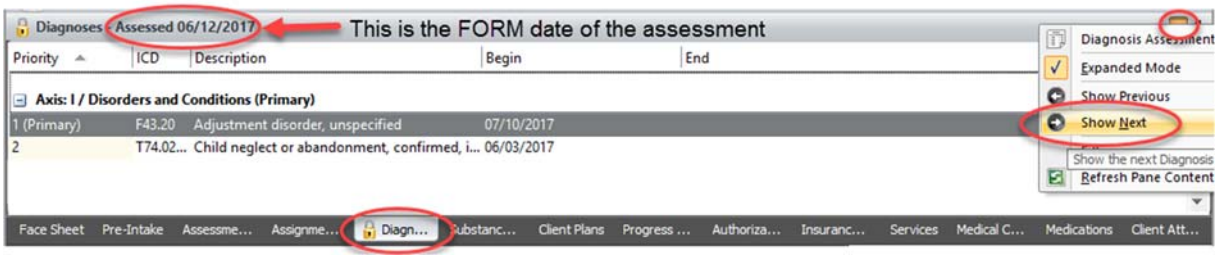
The client's chart reflects there is a diagnosis form covering that DOS, 6/12/17. ***Reminder: change your filters if you are looking for an older DOS.***

Assessments

Date	Description
05/17/2017	Demographics Form
06/03/2017	Diagnosis Form
06/03/2017	Diagnosis Form
06/12/2017	Diagnosis Form
07/10/2017	Demographics Form
07/10/2017	Diagnosis Form

Reminder: A diagnosis form can be embedded in other assessments, such as the Psychiatric Assessment. You may also check the diagnosis pane to see form dates of assessments that include diagnoses.

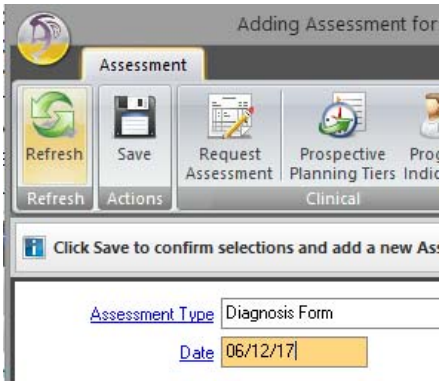
Hint: When using "Show Next," a blank diagnosis screen will display in-between the most recent diagnosis and the very first assessment entered. Although there is a FORM date covering the DOS, there are no mental health diagnoses covering the DOS.

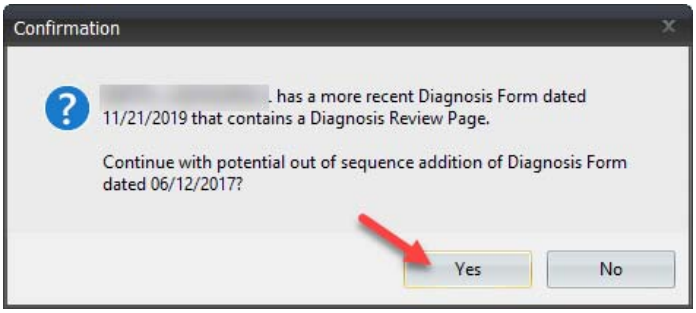


✓ **Correction B:**

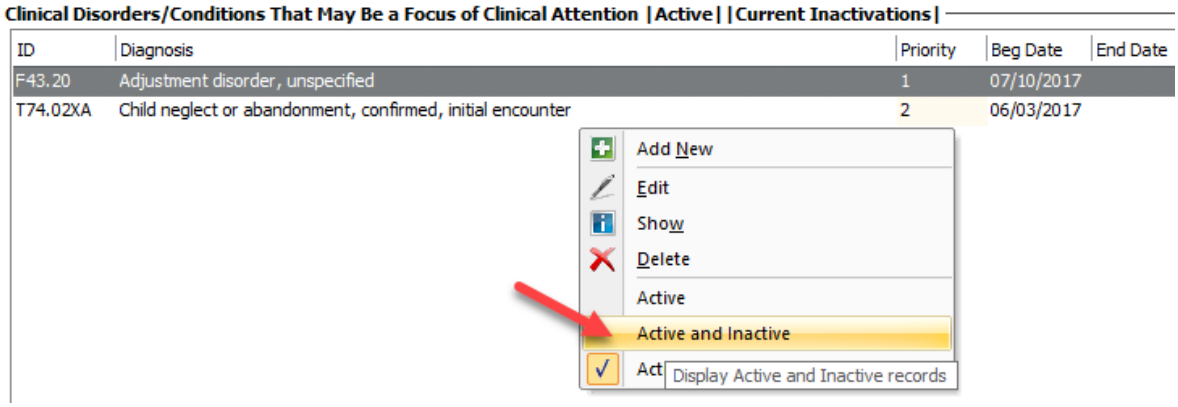
1. **Add a new Diagnosis Form, dated the DOS.**
2. **Ensure there is a mental health diagnosis covering the DOS and final approve the form.**
3. **If when a form is back dated a notification stating it was not the most recent diagnosis form appears, add a second diagnosis form, dated today's date, and make the same changes to it as the back dated diagnosis form.**

1. **Add a new Diagnosis Form, dated the DOS.**



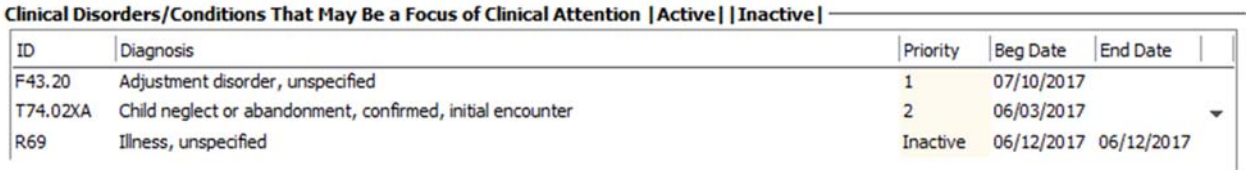


Hint: It may be helpful to change the view to see all active and inactive diagnoses to be able to determine if there is a mental health diagnosis covering the DOS.



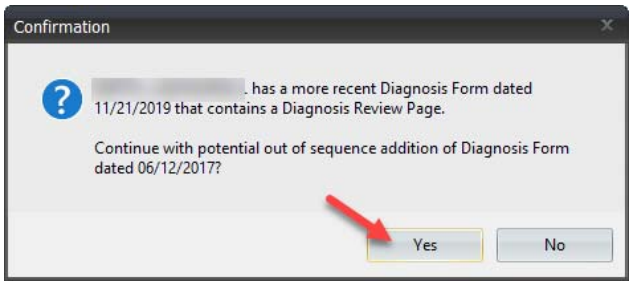
2. **Ensure there is a mental health diagnosis covering the DOS and final approve the form.**

In this case, there was not a mental health diagnosis to cover the DOS. Either change the start date of an applicable diagnosis early enough to cover the DOS or enter in the deferred diagnosis. If a deferred diagnosis is used, both the begin and end date must be entered, as there are already valid diagnoses in this client's chart. [Reminder: NEVER change the start date to be a more recent date than what is already displaying].

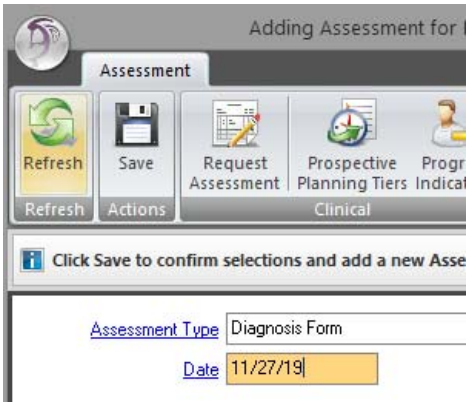


3. **If when a form is back dated a notification stating it was not the most recent diagnosis form appears, add a second diagnosis form, dated today's date, and make the same changes to it as the back dated diagnosis form.**

When the back dated form was entered the notification displayed. Enter a new form dated today and make the same changes that were made in the back dated form.



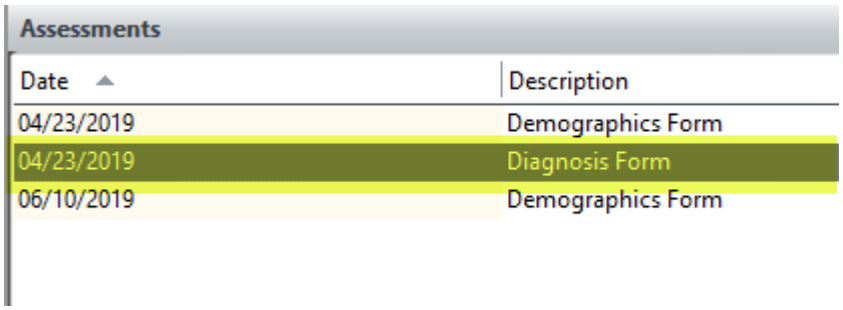
In the back dated form a deferred diagnosis was added to cover the DOS. Do the same in this assessment to cover the DOS. Then sign and final approve the assessment.



Error C: Example of a non-mental health diagnosis.
The report states the DOS is 4/23/19.

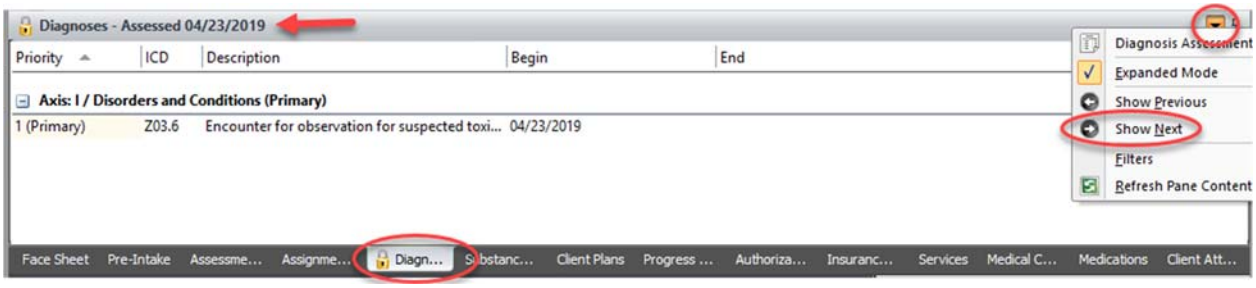
Record Type	Case Numbe	Client Name	DOS/ Form Da	Error Message
Service	[redacted]	[redacted]	4/23/2019	No Principal MH Diagnosis (Please enter a Mental Health diagnosis code in the Diagnosis form)

The client's chart reflects there is a diagnosis form covering that DOS, 4/23/19. ***Reminder: change your filters if you are looking for an older DOS.***



Reminder: A diagnosis form can be embedded in other assessments, such as the Psychiatric Assessment. You may also check the diagnosis pane to see form dates of assessments that include diagnoses.

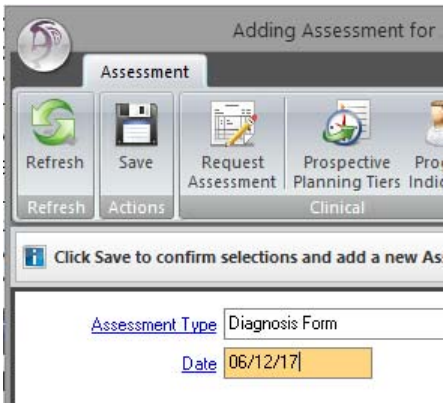
Hint: When using "Show Next," a blank diagnosis screen will display in-between the most recent diagnosis and the very first assessment entered. Although there is a FORM date covering the DOS, there are no mental health diagnoses covering the DOS.



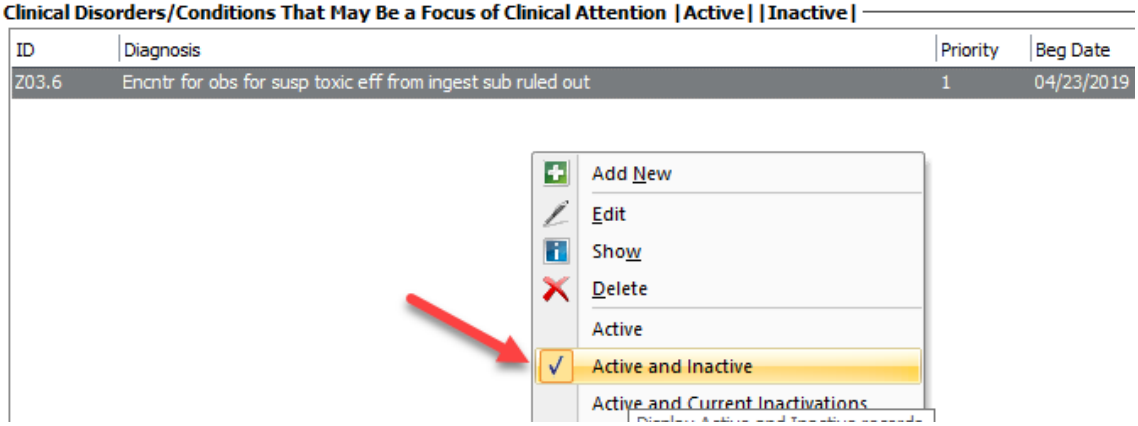
✓ **Correction C:**

1. **Add a new Diagnosis Form, dated the DOS.**
2. **Ensure there is a mental health diagnosis covering the DOS and final approve the form.**
3. **If when a form is back dated a notification stating it was not the most recent diagnosis form appears, add a second diagnosis form, dated today's date, and make the same changes to it as the back dated diagnosis form.**

1. **Add a new Diagnosis Form, dated the DOS.**

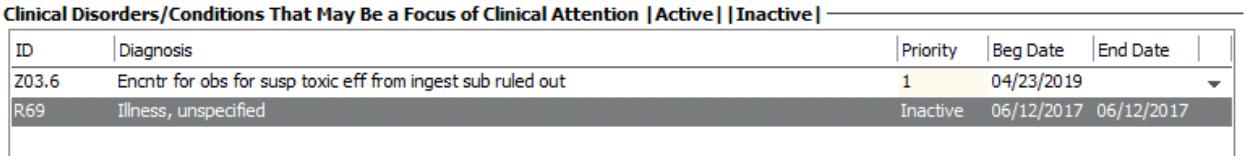


Hint: It may be helpful to change the view to see all active and inactive diagnoses to be able to determine if there is a mental health diagnosis covering the DOS.



2. **Ensure there is a mental health diagnosis covering the DOS and final approve the form.**

In this case, there was not a mental health diagnosis to cover the DOS. Either change the start date of an applicable diagnosis early enough to cover the DOS or enter in the deferred diagnosis. If a deferred diagnosis is used, both the begin and end date must be entered, as there are already valid diagnoses in this client's chart. [Reminder: NEVER change the start date to be a more recent date than what is already displaying].



3. **If when a form is back dated a notification stating it was not the most recent diagnosis form appears, add a second diagnosis form, dated today's date, and make the same changes to it as the back dated diagnosis form.**

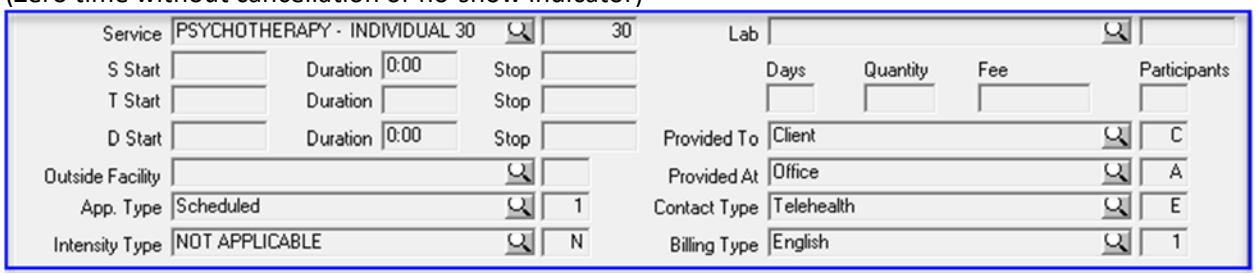
No notification was received when the form was back dated, making the back dated form the most recent form. No additional form is necessary.

✓ **Error: Invalid Service time**

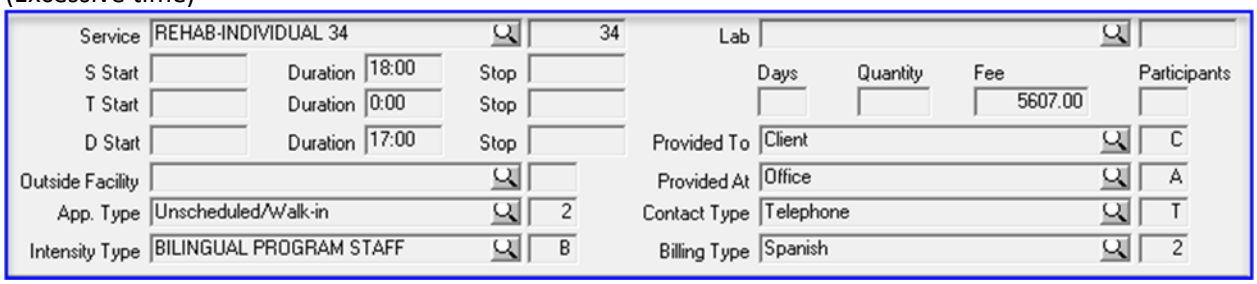
Services should not have zero time indicated, unless it is also indicated that the service was cancelled by the program/client, or if the client was a no show. This error will also populate if it seems excessive time was entered in the service (EX: hours instead minutes).

Example of incorrect service time:

(Zero time without cancellation or no-show indicator)

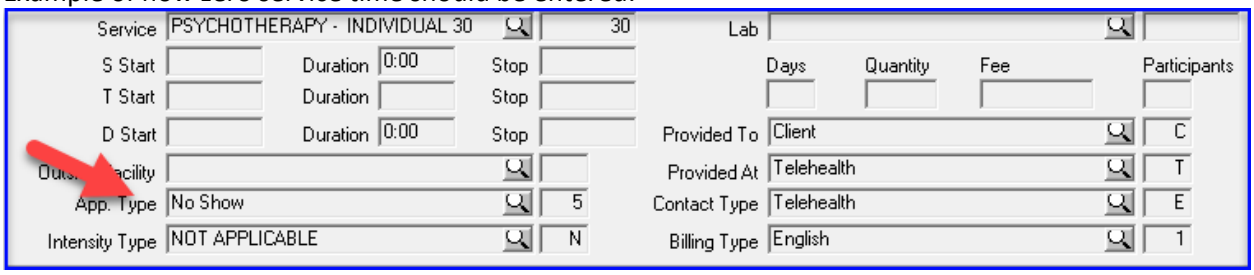


(Excessive time)



✓ **Correction: Review the service and follow the progress note correction guide as applicable. Usually this involves contacting Optum Support Desk to void and replicate the note.**

Example of how zero service time should be entered:



✓ **Error: CIN Error**

The CIN number, or medi-cal ID number, was entered incorrectly. This error will populate if what is entered does not meet standard formatting guidelines.

✓ **Correction: Correct the medi-cal policy number in the client's chart. If you are unsure how to do this, contact MHBU, and they will assist you.**