



County of San Diego
HEALTH AND HUMAN SERVICES AGENCY

NICK MACCHIONE, MS, MPH, FACHE
DIRECTOR

SUSAN BOWER, MSW, MPH
DIRECTOR OF OPERATIONS

ALFREDO AGUIRRE, LCSW
BEHAVIORAL HEALTH DIRECTOR

BEHAVIORAL HEALTH SERVICES DIVISION
3255 CAMINO DEL RIO SOUTH, SAN DIEGO, CALIFORNIA 92108
(619) 563-2700 • FAX (619) 563-2705

MARSHALL LEWIS, MD, DFAPA
CLINICAL DIRECTOR

Date: August 27, 2012

TO: All Mental Health Programs

FROM: Quality Improvement Unit

The County of San Diego fulfills CSI reporting requirements by pulling targeted data fields from the **Demographics** and **Diagnosis** forms entered into Anasazi. These forms must be thoroughly updated to ensure accurate data is reported to the State.

The Department of Health Care Services issued a DMH Information Notice No. 12-01, dated 03/27/12, clarifying the periodic record data collection and reporting procedures for the Client and Service Information (CSI) System. Analyses of previously reported Periodic record data by DMH show that clarification is needed to ensure uniform reporting of this important data. In the past, the reporting procedures for collecting and reporting Periodic record data to CSI have been confusing or not clearly stated for some county Mental Health Plans (MHPs). Thus, some counties have not been properly reporting Periodic record data to CSI.

Periodic record data allows DMH to respond to requests for information about MHP clients and their functioning levels over time.

In order to accurately respond to these requests, providers must ensure that they are collecting and entering client data at the following three intervals:

1. At "FIRST CONTACT" with the County Mental Health Plan

The collection and reporting of Periodic record data for all MHP clients at "first contact," or prior to the initial provision of mental health services ensures that baseline functioning level data are collected at the beginning of each client's contact with the MHP.

2. "ANNUALLY THEREAFTER" for all active or continuing MHP clients

The collection and reporting of Periodic record data on an annual basis for all active or continuing MHP clients ensures that current functioning level data are collected for analysis with baseline functioning level data to relate changes in a client's functioning levels over time.

MHPs are encouraged to utilize a client's annual Universal Method to Determine Ability to Pay (UMDAP) appointment to collect Periodic record data for annual reporting. At a minimum, MHPs should report Periodic record data annually for all active or continuing clients.

3. AT "FORMAL DISCHARGE" from the MHP

The collection and reporting of Periodic record data at formal discharge (i.e., no further mental health services needed, client has reached treatment goals, client no longer receiving MHP services) from the MHP ensures that functioning level data as of "formal discharge" are collected for analysis with baseline and annual functioning level data to assess treatment efficacy of services delivered by the MHP.

If you have any questions, contact QIMatters.hhsa@sdcounty.ca.gov.

Regards,

Steve Jones, LCSW
QI Program Manager
HHSA, BHS

