



Service Corrections, Replacements and Deletions Procedure

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Purpose To provide instruction to Department of Behavioral Health (DBH) Revenue Cycle staff regarding the procedure for processing service data corrections, replacements, and/or deletions in myAvatar via the Charge Data Correction Invoice (CDCIs).

Revenue Cycle Procedure for DBH Clinics/Programs UNBILL or CLAIMED Service Requests and Charge Data Corrections Invoice (CDCI)

The following procedure is to be followed by Revenue Cycle staff when Revenue Cycle receives a request from a DBH clinic to update a service from "UNBILL" to "OPEN" status or receives a CDCI for a CLAIMED service in the DBH-CDCI@dbh.sbcounty.gov email inbox:

UNBILL	
If ...	Then ...
<p>Services are in UNBILL status, a Help Desk (HD) ticket and an email with "URGENT: Request to Open UNBILL Services" is received.</p> <p>EXCEPTION: If a service shows in UNBILL status for a secondary guarantor and CLAIMED for a prior guarantor, Revenue Cycle staff will reach out to DBH staff to notify them the service cannot be reverted to OPEN and a CDCI will be required.</p>	<p>A. Revenue Cycle confirms service is in UNBILL status in the Client Ledger.</p> <p>B. Revenue Cycle OPENS the services and update help desk ticket to notify DBH clinic staff via email the request has been processed and will close HD ticket, and</p> <p>C. Revenue Cycle processes requests within one (1) hour of receiving a Request to Open Services email.</p>
CLAIMED	
If ...	Then ...
<p>Services are in CLAIMED status, a Help Desk ticket and an email with " CDCI - Request to attach new service to claim" is received</p>	<p>A. Revenue Cycle staff will process requests once response has been received for CLAIMED service;</p> <p>B. Revenue Cycle staff will confirm incorrect service(s) show in claimed status in the Client Ledger. If a replacement is needed on the CDCI, Revenue Cycle staff will proceed with the following steps. If no replacement is needed, proceed to step J;</p>

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Revenue Cycle Procedure for DBH Clinics/Programs UNBILL or CLAIMED Service Requests and Charge Data Corrections Invoice (CDCI), continued

CLAIMED (continued)	
If ...	Then ...
<p>Services are in CLAIMED status, a Help Desk ticket and an email with " CDCI - Request to attach new service to claim" is received, continued</p>	<p>C. Revenue Cycle staff will confirm if the new service(s) appear(s) in OPEN status in the Client Ledger and matches the information on the CDCI Form;</p> <p>D. Revenue Cycle staff will close charges for new service(s);</p> <p>E. Revenue Cycle staff will attach new service(s) to incorrect service(s) claim(s);</p> <p>F. Revenue Cycle staff will update HelpDesk Ticket to confirm the new service has been attached;</p> <p>G. DBH Program staff will receive Helpdesk ticket email with updates;</p> <p>H. Revenue Cycle staff will update CDCI log;</p> <p>I. Revenue Cycle staff will update Follow-Up Entry form;</p> <p>J. If claim of incorrect service has a response from the State (has been paid or denied):</p> <ol style="list-style-type: none"> 1. Revenue Cycle staff marks services for rebill (either to replace or to void depending on the scenario), and 2. skip step K, go to step L; <p>K. If claim of incorrect service(s) does not show a response:</p> <ol style="list-style-type: none"> 1. Revenue Cycle staff will monitor claims with pending CDCI's for responses, and 2. When a claim of incorrect service(s) receives a response, staff marks services for rebill (either to replace or to void depending on the scenario). <p>L. Revenue Cycle staff will process and submit to Department of Health Care Services (DHCS) a Void and Replace (V&R) claim;</p>

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Revenue Cycle Procedure for DBH UNBILL or CLAIMED Service Requests and Charge Data Corrections Invoice (CDCI), continued

CLAIMED STATUS (continued)	
If ...	Then ...
Services are in CLAIMED status, a Help Desk ticket and an email with "URGENT: CDCI - Request to attach new service to claim" is received., continued	<p>M. Revenue Cycle staff will monitor when response is received for the rebilled service and payment/denial is posted;</p> <p>N. Revenue Cycle staff will delete the original service;</p> <p>O. Revenue Cycle staff will update Follow Up Entry form;</p> <p>P. Revenue Cycle staff will update the CDCI log;</p> <p>Q. Revenue Cycle staff will close the HD ticket;</p> <p>R. County Clinic staff receives Helpdesk ticket email with updates, and</p> <p>S. CDCI process ends.</p>

Revenue Cycle Procedure for Contract Agencies and other County Departments' Service requests and Charge Data Corrections Invoice (CDCI) (UNBILL/ CLAIMED)

The following process is applied when the Revenue Cycle staff receives a request from Contract Agencies or other County Department staff to update a service from "UNBILL" to "OPEN" status or receives a CDCI for a CLAIMED service in the DBH-CDCI@dbh.sbcounty.gov email inbox.

EXCEPTION: If a service shows in UNBILL status for a secondary guarantor and CLAIMED for a prior guarantor, staff will reach out to contract provider or county staff to notify them the service cannot be reverted to OPEN and a CDCI will be required.

UNBILL	
If ...	Then ...
Services are in UNBILL status, a Help Desk ticket and an email with "URGENT: Request to Open UNBILL Services" is received.	<p>A. Revenue Cycle staff confirms service is in UNBILL status in the Client Ledger. (See exception above);</p> <p>B. Revenue Cycle staff OPENS the services and updates help desk ticket to notify Contract Agencies or other county departments' staff via email the request has been processed and will close HD ticket, and</p> <p>C. Revenue Cycle staff processes requests within one (1) hour of receiving a Request to Open UNBILL Services email.</p>

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Revenue Cycle Procedure for Contract Agencies and other County Departments' Service requests and Charge Data Corrections Invoice (CDCI) (UNBILL/CLAIMED), continued

CLAIMED STATUS	
If ...	Then ...
Services are in CLAIMED status, a Help Desk ticket and an email with subject line " CDCI - Request" is received.	<p>A. Revenue Cycle staff will process requests once response has been received for CLAIMED service;</p> <p>B. Revenue Cycle staff will confirm incorrect service(s) show in claimed status in the Client Ledger. If a replacement is needed on the CDCI, Revenue Cycle staff will proceed with the following steps. If no replacement is needed, proceed to step J;</p> <p>C. Contract Agency or other county departments' staff receive Helpdesk ticket email with updates;</p> <p>D. Revenue Cycle staff will update CDCI log;</p> <p>E. Revenue Cycle staff will update Follow-Up Entry form;</p> <p>F. If claim of incorrect service has a response from the State (has been paid or denied):</p> <ol style="list-style-type: none"> 1. Revenue Cycle staff makes service necessary corrections and marks services for rebill (either to replace or to void depending on the scenario). <p>G. If the correction requires a new service to be entered [corrections due to incorrect date/client/client identification number (CIN)], the new service is entered, and</p> <ol style="list-style-type: none"> 1. New services to correct incorrect date will claim as replacements to the incorrect service. 2. New services to correct incorrect client/CIN will claim as new services, separate from the void of the service claimed for the incorrect client. <p>Note: If step G is completed, Skip step H, go to step I;</p>

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Revenue Cycle Procedure for Contract Agencies and other County Departments' Service requests and Charge Data Corrections Invoice (CDCI) (UNBILL/ CLAIMED), continued

CLAIMED STATUS, continued	
If ...	Then ...
<p>Services are in CLAIMED status, a Help Desk ticket and an email with subject line " CDCI - Request" is received., continued</p>	<p>H. If claim of incorrect service(s) does not show a response:</p> <ol style="list-style-type: none"> 1. Revenue Cycle staff monitors claims with pending CDCI's for responses; I. When a claim of incorrect service(s) receives a response, Revenue Cycle staff makes corrections and marks services for rebill (either to replace or to void depending on the scenario); J. Revenue Cycle staff processes and submits to the State a Void and Replace (V&R) claim; K. Revenue Cycle staff monitors when response is received for the rebilled service and payment/denial is posted; L. Revenue Cycle staff deletes the original/incorrect service; M. Revenue Cycle staff updates Follow Up Entry form; N. Revenue Cycle staff updates the CDCI log; O. Revenue Cycle staff closes the Helpdesk ticket; P. Contract Agency or other county departments' staff receives Helpdesk ticket email with updates, and Q. CDCI process ends.

Related Policy or Procedure

[DBH Standard Practice Manual and Departmental Forms:](#)

- Clinic Responsibility for Processing Client Registration, PFI, CDI (CLK0703)
- Charge Data Invoice (CDI) Process Procedure (CLK0704)
- Correction of Overlapping Service (CLK0707)
- Service Deletions and Corrections Policy (CLK0708)
- Charge Data Correction Invoice Form (CLP010)