

SUD Clients Missing Data - Quick Checklist

Use this checklist to monitor and update client information in SmartCare. All required fields must be completed within 14 days of program enrollment.

Report Item	Where to Update	Action Required
Email	Client Info → General tab	Enter if available. Leave blank if none.
Phone	Client Info → General tab	Enter if available. Leave blank if none (will prompt again).
Address	Client Info → General tab	Required for billing. If none, use: 20 North San Pedro Rd, San Rafael, 94903.
Sex, Gender Identity, Sexual Orientation, Ethnicity, Race	Client Info → Demographics tab	Complete all fields. If unknown, select the most accurate option (Unknown, Declined, Not Asked, etc.).
Language	Client Info → Demographics tab (midway)	Select best choice. Mark 'Interpreter needed' if applicable.
Payer	Client Finance → Coverage	Medi-Cal: Verify eligibility. Non-Medi-Cal: Click 'New'.
Timeliness	Client Documents	Follow separate Timeliness procedure.

Monitoring: Run the 'SUD Clients Missing Data' report monthly. Update missing items promptly.