

SUD Clients Missing Data

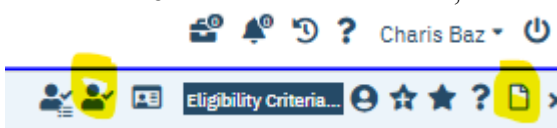
9/23/25

Several pieces of key information about a client are required in SmartCare within 14 days of enrollment in a program. When these are missing it can cause problems with billing and reporting.

Running the report

To identify clients missing data and monitor compliance with this requirement, run the **Marin SUD Clients Missing Data** report in SmartCare.

Missing data identified on the report and how to resolve

Report item:	SmartCare screen:	What to do: Select client in SmartCare, navigate to listed screen
Email*	Client Information screen, General tab	<ul style="list-style-type: none"> *Many clients don't have email, and email will only be listed on the report if the client is also missing some other data element Please fill in the email address if the client has one. If client has no email, please leave field empty
Phone*	Client Information screen, General tab	<ul style="list-style-type: none"> *Many clients don't have a phone, but we will continue to list it as missing if it is blank as a prompt to ask the client again Please fill in the phone number if the client has one. If client has no phone, please leave field empty
Address	Client Information screen, General tab	<ul style="list-style-type: none"> Address is required for billing purposes If the client has no address, enter 20 North San Pedro Rd, San Rafael, 94903 as the address (HHS offices)
Sex, Gender Identity, Sexual Orientation, Ethnicity, Race	Client Information screen, Demographics tab	<ul style="list-style-type: none"> These fields are required and are at the top of the Demographics tab Please use the appropriate choice if you don't know the true value <ul style="list-style-type: none"> The fields differ in how they treat situations where you don't know. Sometimes you have a choice of Unknown vs Declined to Answer vs Not asked, etc. Please pick the most accurate choice by scrolling through the whole list to review the options for that field.
Language	Client Information screen, Demographics tab	<ul style="list-style-type: none"> Scroll halfway down the Demographics tab to see the Language field Pick the best choice We encourage you to also pick the "interpreter needed" box as appropriate
Payer	Client Finance Coverage	<ul style="list-style-type: none"> Navigate to client coverage screen Enter payer plans only once in the coverage screen so they show up in the lower box <ul style="list-style-type: none"> To add Medi-Cal, click "Verify eligibility" To add non-Medi-Cal, click "new" 
Timeliness	Client documents	<ul style="list-style-type: none"> See separate instructions/procedure for Timeliness entry and monitoring

Monitoring client data compliance

- Monthly, run the report **SUD Clients Missing Data**
- This report lists any client enrolled in a substance use program 14+ days ago with missing data, if they were enrolled in a program since 9/1/25. The data that is missing is listed in the last column.
- Enter data as possible, see details above