AREA AGENCY ON AGING
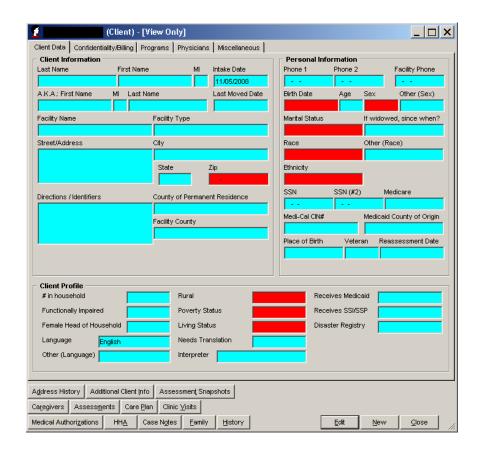OF LAKE & MENDOCINO COUNTIES

PSA 26

Finding Missing Client Information in Q

The California Department of Aging (CDA) requires certain demographic information to be entered for C1 Nutrition, C2 Nutrition, Adult Day and Caregiver clients:

- Birth Date
- Zip Code
- Rural Status
- Gender
- Race
- Ethnicity
- Poverty Status
- Living Arrangement
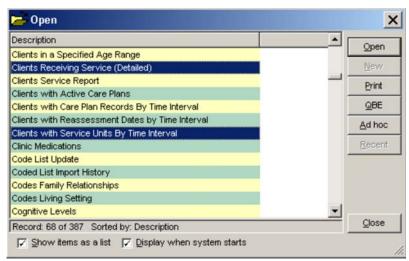- Marital Status (FCSP only)

A quarterly error report is provided from the CDA to PSA26 Area Agency on Aging of Lake and Mendocino Counties. It indicates clients with incomplete data. CDA is moving towards the policy of "no acceptance" on clients missing any of the above data. Service units entered for clients missing data will be disallowed and the record(s) discarded.

To ensure that you have all demographic data input for your clients, make use of the following procedure:

1) To view ALL clients that are <u>ELIGIBLE</u> to receive service units, run "*Clients Receiving Service (Detailed)*" report, or;

To view ALL clients that have <u>RECEIVED</u> service units already, run "*Clients with Service Units By Time Interval*" report.

2) Enter the information for the Agency/Service/Funding Source that you want to query (example is for all eligible clients).

Tip: Enter today's date (Spacebar) in Start and End Date fields to get a listing of all clients eligible right now.

3) When the results are displayed make sure add the required demographic columns.

4) Single click on the title of the column (birthdate in example) to sort by that data Blank information is moved to the top of the results so you can easily see all the clients that are missing that information.

5) Go to each client and enter the correct information. Then go to the next client.

Once you enter all the missing information on the first column then single click on the second column (ethnicity in the example) and repeat the steps listed above

Go through all the columns of data and find and correct missing information.

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