

2026 Demographic Cleanup Memo

Plan of Action and Request for Feedback

To: California Behavioral Health Departments Using SmartCare

From: California Mental Health Services Authority

Date: August 27, 2026

Re: SmartCare Demographic Fields Cleanup — Plan of Action and Request for Feedback

Counties previously indicated that demographic fields in SmartCare were confusing, contained inappropriate values, or were missing key data. CalMHSA began work to address these issues but paused to prioritize compliance with the requirement for all EHRs to adopt USCDI v3 as the baseline standard, effective Jan. 1, 2026. Since then, the CalMHSA EHR team has worked with Streamline, the CalMHSA Connex Team, and the CalMHSA Data Team (Compass and Collective) to complete this project.

This memo outlines the resulting plan of action and requests county feedback prior to implementation.

Summary

CalMHSA's approach is designed to support counties in maintaining compliance, standardize demographics to better align with data tracking across the state, and provide flexibility in customizing the demographic options presented to end users. This plan will impact existing client records; CalMHSA has taken steps to minimize this impact as much as possible. CalMHSA will plan to implement this change via a SQL script first in QA systems before moving this to production systems.

CalMHSA is providing two weeks for counties to provide any feedback or concerns about this plan and ask any questions. After two weeks, if no significant concerns are raised, CalMHSA will move forward with running this script in QA systems. CalMHSA will notify counties in a future EHR Bulletin when the script has been run in QA. Counties will be given two weeks to test in QA systems. If no issues are found, CalMHSA will move forward with running the script in Production. CalMHSA will notify counties through the Bulletin when the script has been run in Production.

For feedback and questions, please reach out to CalMHSA at ehr@calmhsa.org.

Impacted Fields

There are five (5) fields in the Client Information: Demographics screen being impacted:

1. Race
2. Ethnicity
3. Sexual Orientation
4. Gender Identity
5. Language

There is a sixth, “Hispanic Origin,” which lives in the Language section of this screen, that CalMHSA is recommending that counties do not use. CalMHSA will not be changing this global code, and will not be using it for any reporting or interoperability purposes.

Plan Overview

Part of the difficulty of this project is the unique needs of each county. Some counties may have certain languages that are commonly spoken, whereas other counties never meet clients who speak that language. The goal is to provide counties with the ability to choose which options are available to their users, while not requiring counties to create new options that may or may not be USCDI compliant.

To this end, CalMHSA will be updating the global code categories that feed these fields to include ALL options available under USCDI v3. They will include the appropriate USCDI mapping for interoperability’s sake. Global code values that are NOT USCD v3 compliant will be brought up to compliance or removed.

This means the global code categories will hold vast amounts of options. However, not all of these will be active. The CalMHSA data team has reviewed county demographics and determined a standardized default list that should work for *most* counties. Only those global codes will be listed as “active,” meaning only these will be available for users to select.

If a county wants to alter the list, the global code can be deactivated -- which will remove it from the available list -- or activate a currently inactive code, which will add it to the list. This will allow counties to customize the list as they see fit.

To better align with USCDI guidelines, CalMHSA will be removing the ability for a county to add a new global code to one of these global code categories. Counties will also not be able to rename the code itself. If counties want a code added, they need to cite a clear business use case for it.

This plan will help counties stay in compliance, customize the lists that end users see, and ensure that client demographic data is tracked consistently across the state.

Plan Details

The full list of global codes, including what currently exists and what’s being changed, can be found [here](#).

Global Code Category: RACE

This USCDI category has different levels of granularity. For example, the lowest level of granularity includes only six options:

1. Alaskan Native/American Indian
2. Asian
3. Black/African American
4. Middle Eastern/North African
5. Native Hawaiian/Other Pacific Islander
6. White

Under each of these are more granular codes. For example, under “Asian,” “Filipino” will be listed. CalMHSA has utilized a naming convention and sort order to organize these both alphabetically and logically. For the six general codes listed above, they will display exactly as above in SmartCare. For more granular codes, they will be preceded by the general code name, or an abbreviation. For example, “Asian – Filipino” or “AN/AI – Hoopa.”

The sort order will be set to the following:

1. The general code
2. The more specific codes that fall under the general code, in alphabetical order
3. The “other” version of the more specific code under the general code
4. The next general code, alphabetically after the general code in #1

For example:

1. Asian
2. Asian – Asian Indian
3. Asian – Filipino
4. Asian – Korean
5. Asian – Thai
6. Asian – Vietnamese
7. Asian – Other
8. Black/African American
9. Black/AA – Ethiopian
10. Black/AA – Jamaican
11. Black/AA – Other

Activating or deactivating codes will not impact the sort order. This means that activating a code, such as “Asian – Mien,” will not require the county to alter the sort order at all. The code will slot immediately into the appropriate space without additional work.

There are also additional options that may feel duplicative. Some of these will remain, such as “Multiracial” and “Other,” as the CalMHSA data team has confirmed that these are valuable and culturally appropriate options. However, some codes are being merged together. “Prefer not to answer” is remaining but “Declined to answer” will be merged with “Prefer not to answer.” “Unknown” is being merged with “Not Asked” to become “Unknown/Not Asked.” See the Impact on Existing Client Records section below for more information.

For the full list of names and sort order, view the file linked at the top of this section.

Global Code Category: ETHNICITY

This SmartCare field has been troublesome, as it seems to be a repeat of the Race field. There is also the “Hispanic Origin” field that’s present in the language section. Per the USCDI v3, Ethnicity only includes two broad categories: “Not Hispanic or Latino” and “Hispanic or Latino,” which includes additional granular options to specify the type of Hispanic or Latino Ethnicity. Counties should use the Ethnicity field and ignore the “Hispanic Origin” field entirely.

Because of this, this field will show the most changes and the most deletions. Across SmartCare counties, 1.8 percent of clients have a race selected in the ethnicity field, while the race field itself is NOT populated a specific entry. This ranges from 0.3 -10 percent across SmartCare counties. CalMHSA will crosswalk these entries to the Race field, similar to a merge but completed across fields (from Ethnicity to Race). See the Impact on Existing Client Records section below for more information.

Not all Ethnicity values can be crosswalked to Race values, so some data will still be deleted. For the full list of what is being deleted and merged, view the file linked at the top of this section.

Global Code Category: SEXUALORIENTATION

CalMHSA will be adding a few new options, per county request, to this global code category, including Asexual, Pansexual, and Queer. CalMHSA will also be merging “Declined to state” and “Choose not to disclose” into “Prefer not to answer,” and merging “Unknown sexual orientation” into “Unknown/Not Asked.” See the “Impact on Existing Client Records” section below on the concept of merging and how this impacts existing records.

Global Code Category: GENDERIDENTITY

CalMHSA is not making many changes this this field, but there is one deletion. CalMHSA is removing “Transgender” as an available option, as more specific options are available (“Female-to-Male (FTM)/Transgender Male/Trans Man” and “Male-to-Female (MTF)/Transgender Female/Trans Woman”). CalMHSA cannot do a merge for this code, as it requires input from a user who knows this client.

Global Code Category: LANGUAGE

CalMHSA will not be deleting any items from this list, even if some of them do not have associated USCDI code options. For example, a county requested that “Mixteco” be added some years ago. This does not exist as a language in the code set USCDI uses. The global code option will still be available, but the associated USCDI code field will be left blank. This may mean that the language field is left blank during an interoperability transaction. This includes the options for “Other” and “Unknown/Not Asked,” since neither of these have an option in the current version of the language code set.

There are a few other languages that are used in state reporting that also exist in the language field that don’t have an exact match.

1. Cambodian: CalMHSA is linking this to “Khmer,” which is the national language of Cambodia
2. Mandarin: CalMHSA is linking this to “Chinese”
3. Other Chinese Dialects: CalMHSA is linking this to “Chinese”
4. Other Sign Language: CalMHSA is linking this to “Sign Languages”
5. Spanish: USCDI only includes “Spanish; Castilian,” but CalMHSA is leaving the display name as “Spanish.”

Impact on Existing Client Records

As this is a change to existing global codes, this will impact existing client records.

Any global codes that are being renamed will automatically display with the new name. No change is needed.

Any global codes that are being added will not impact existing client records at all. Users will need to add these new codes manually to the client's demographic screen as necessary.

Any global codes that are being deleted will remove those codes from the client's demographic screen. Users may need to manually adjust these fields to use the appropriate code. Only Ethnicity and Gender Identity have codes that will be deleted.

Any global codes that are being merged with another global code will impact existing client records but should not cause disruption. If a client is assigned a value that is being merged with another, CalMHSA will change the value from the existing value to the new, merged value.

Example:

Client Jimmy Jones has his Race listed as "Unknown" (global code id = 56393). Client Matty Marquis has his race listed as "Not Asked" (global code id = 11130909).

CalMHSA will be renaming "Not Asked" (global code id = 11130909) to "Unknown/Not Asked" (global code id doesn't change, is still 11130909) and will be merging "Unknown" (global code id = 56393) into "Unknown/Not Asked" (global code id = 11130909).

After this change occurs in Production, client Jimmy Jones has his Race listed as "Unknown/Not Asked" (global code id = 11130909). Client Matty Marquis has his race listed as "Unknown/Not Asked" (global code id = 11130909). "Unknown" (global code id = 56393) is no longer available for use (soft-deleted from the system).

For feedback and questions, please reach out to CalMHSA at ehr@calmhsa.org.