

SanWITS Intake Form Instructions

REQUIRED FORM:

The Intake Form is a required document in the client's file and is needed before an episode can be started.

WHEN:

This form will be created after the Contact. The Intake must be linked to the last Contact created. Once the Intake is completed, it opens the Activity List where the new episode can begin along with the Admission record.

COMPLETED BY:

Authorized agency representative

REQUIRED ELEMENTS:

- For instructions on each specific field, refer to CalOMS Data Collection Guide/CalOMS Treatment Data Dictionary.

NOTE:

Some of the fields in the Intake are tied to other parts of the system. The "Source of Referral", "Manner of Contact" and "Initial Contact Date" will be auto-populate from the Contact. Also, if client is male the "Pregnant" field will auto-populate to "No" and will be grayed out.

To bill a client to Drug Medi-Cal Perinatal the client must be marked pregnant on the Intake and the Due Date must be entered.