

## CalOMS Profile Form Instructions

### **REQUIRED FORM:**

The Profile form is a required document in the client's file.

### **WHEN:**

This form will be created **IF** the client profile does not already exist in SanWITS. A thorough search is required. An existing profile should be reviewed and updated if needed for each new episode.

### **COMPLETED BY:**

Authorized agency representative

### **REQUIRED ELEMENTS:**

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

### **NOTE:**

To effectively manage client information, each client should have only one profile. To reduce the number of duplicate client records, SanWITS does not allow a social security number to be used more than once or a participant ID to be used for more than one client. The State Client ID aka Unique Client number aka participant ID is based on the first and last initial of the birth name, the middle initial (the system will enter a zero if there is no middle name), a code for gender (1-male and 2-female) as well as the date of birth (DOB). Carefully search for a client before adding them to the database. Check your SanWITS User's Manual for different search criteria.

Fields in the client profile are linked to other areas in SanWITS. The Admission, Annual Update and Discharge record will not be uploaded to the state if the Profile form is not completed in SanWITS.

Payor Group Enrollment is part of the profile. This section is required only for Drug Medi-Cal (DMC) billing.

Collateral Contacts are part of the Profile but are not required unless your program requires this information. Because various contacts can be entered, Collateral Contacts has its own form S109B.