

## CalOMS Annual Update Form Instructions

### **REQUIRED FORM:**

The Annual Update form is a required document in the client file if the client remains in treatment for 12 months or longer continuously in one provider and one service modality with no break in services exceeding 30 days.

### **WHEN:**

The Annual Update can be created as early as 60 days before the individual's admission date anniversary and completed in SanWITS **no later** than the 12 month admission date anniversary.

### **COMPLETED BY:**

Authorized agency representative

### **REQUIRED ELEMENTS:**

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

### **NOTE:**

Annual updates are required for each year thereafter that the client is in the same program and modality continuously.

Annual Updates are to be completed for Active clients only. Do not open a discharged client in order to do an Annual Update as the record will be rejected.