

## SanWITS Contact Form Instructions

### REQUIRED FORM:

The Contact Form is a required document in the client's file and is needed before an intake can be created.

### WHEN:

This form will be created after the Profile. A contact should be created each time a client contacts the facility until an appointment is made. There must be a Contact to be able to create an intake.

### COMPLETED BY:

Authorized agency representative

### REQUIRED ELEMENTS:

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

### NOTE:

You might have several Contacts before you create an Intake. The Intake must be linked to the last Contact created.

**IMPORTANT:** The [Complete Review](#) link converts the screen into "read only". Therefore, the Contact screen should be reviewed for accuracy and "Complete Review" action should be done at the time the client is present for intake.

Some of the fields in the Contact are tied to other parts of the system. Pay special attention to the "Source of Referral" question. If the Source of referral code values 7, 10 or 12 is entered, then the Criminal Justice Status question in the admission record cannot equal 1 "No Criminal Justice Involvement". If Source of Referral contains 7, 10, or 12 and Criminal Justice Status contains 1, an error will occur and the record will be rejected.

If Source of Referral code is value 8 (AB109 clients) then the Criminal Justice Status must be a value 4, or an error will occur and the record will be rejected.