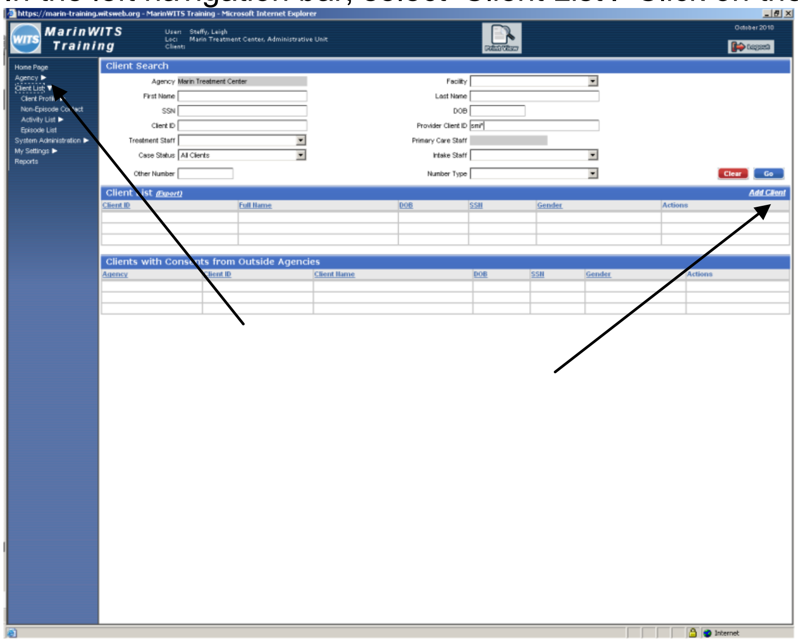
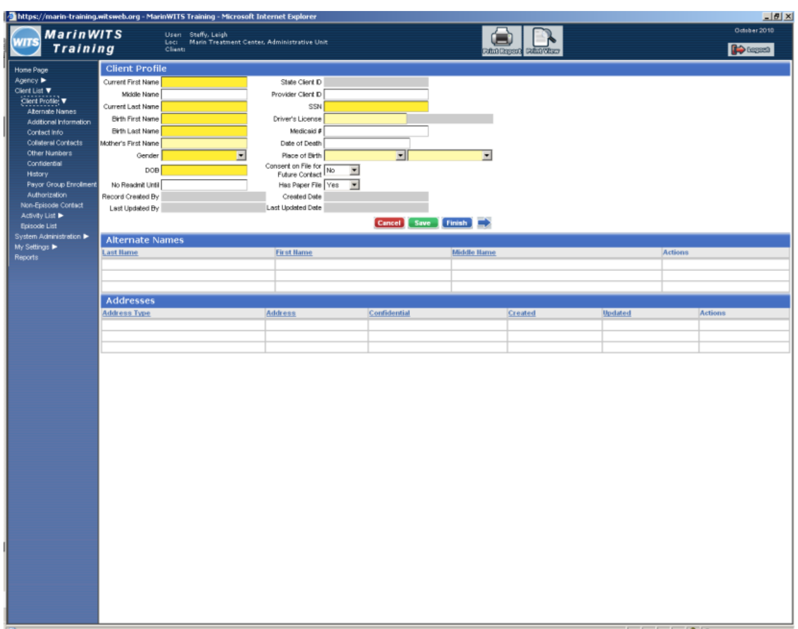
HOW TO ADD A CLIENT TO THE WAITLIST

In the left navigation bar, select 'Client List'. Click on the yellow Add Client link.

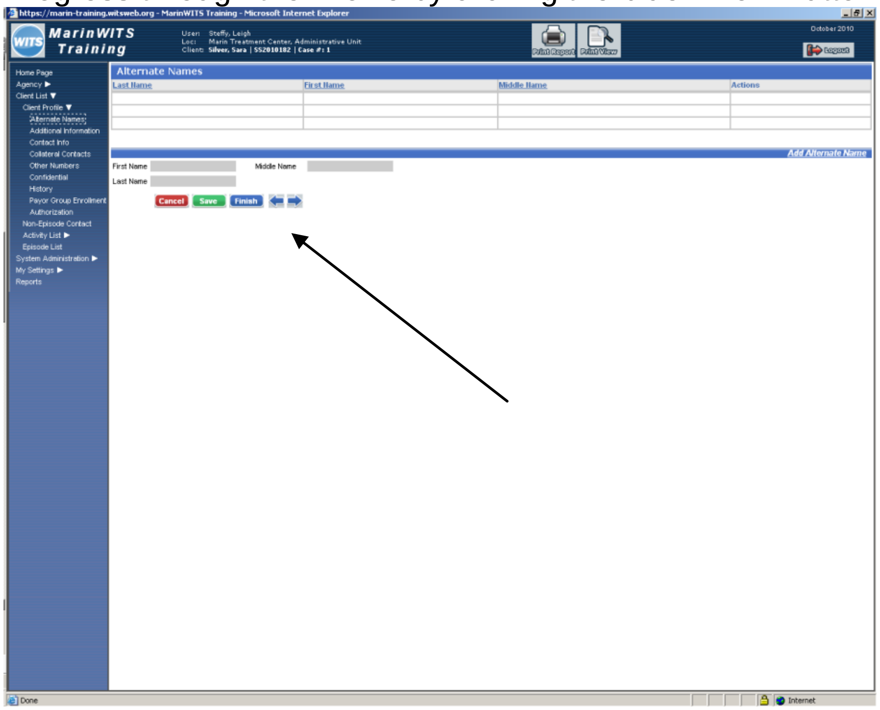


This will open the client profile section.

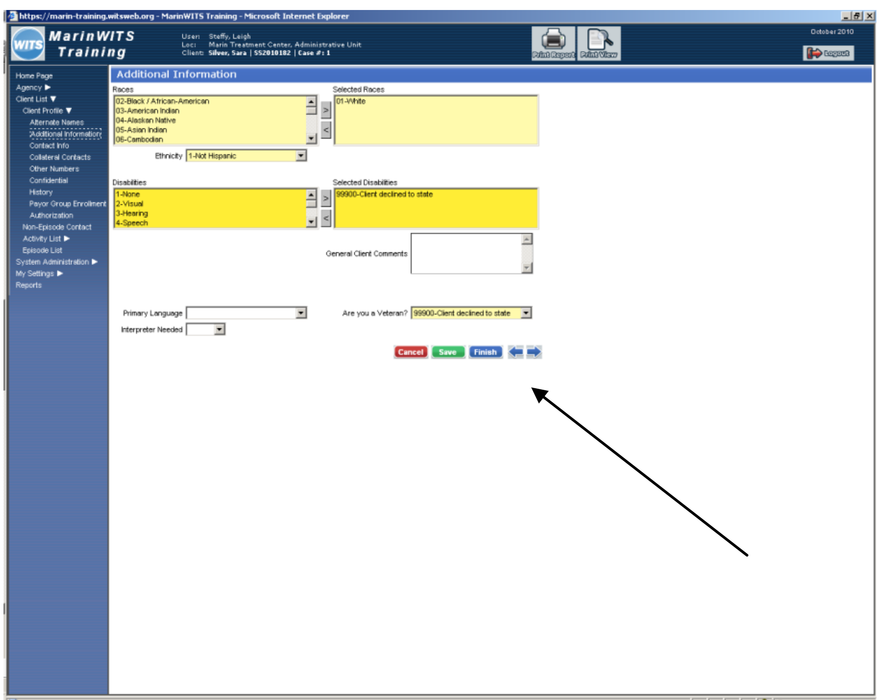


Refer to CalOMS Data Reference Guide for assistance filling out the fields. All yellow highlighted fields are required.

Progress through the Profile by clicking the blue Arrow Buttons on each page.

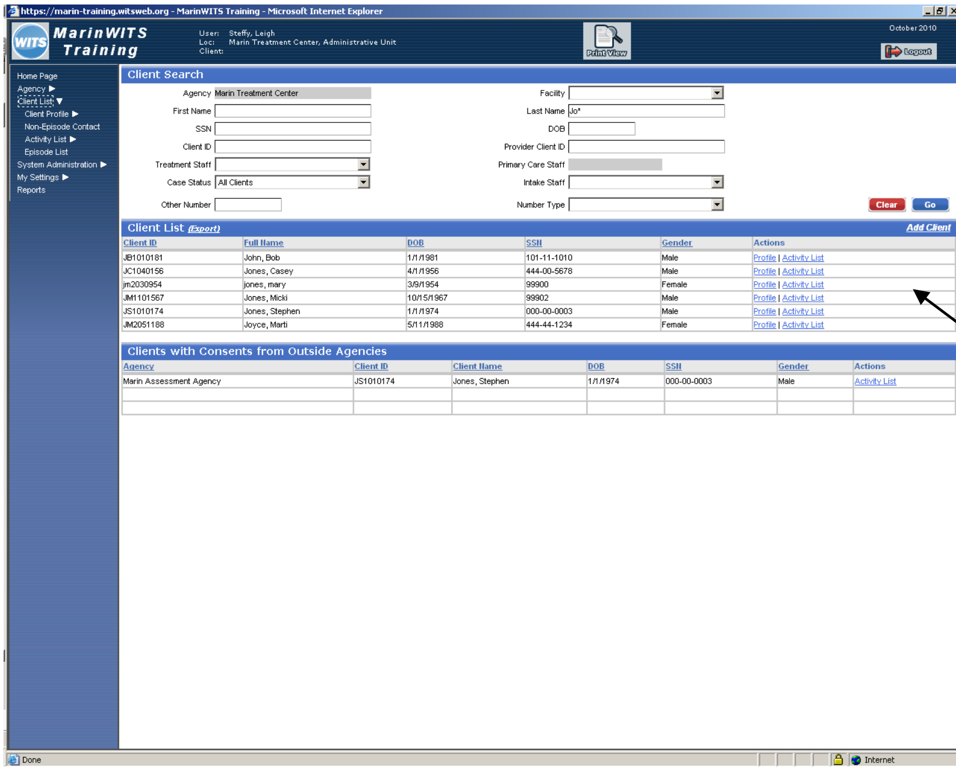


There are no required fields on this page.

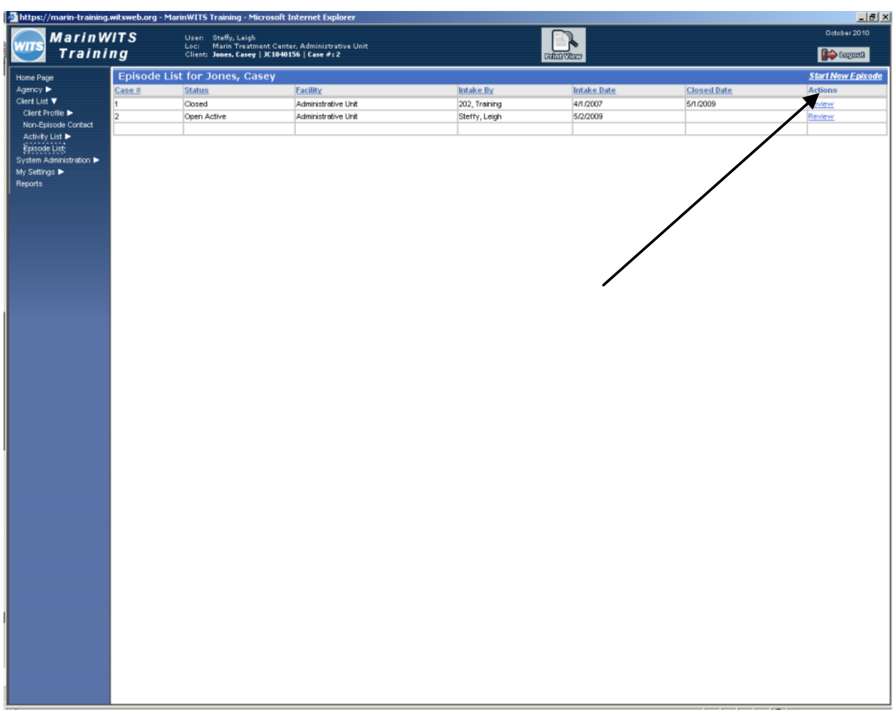


This is the last page that has required information for non Drug-Medi-Cal clients. You can hit the Blue Finish button at the bottom of this page if you do not wish to add additional information.

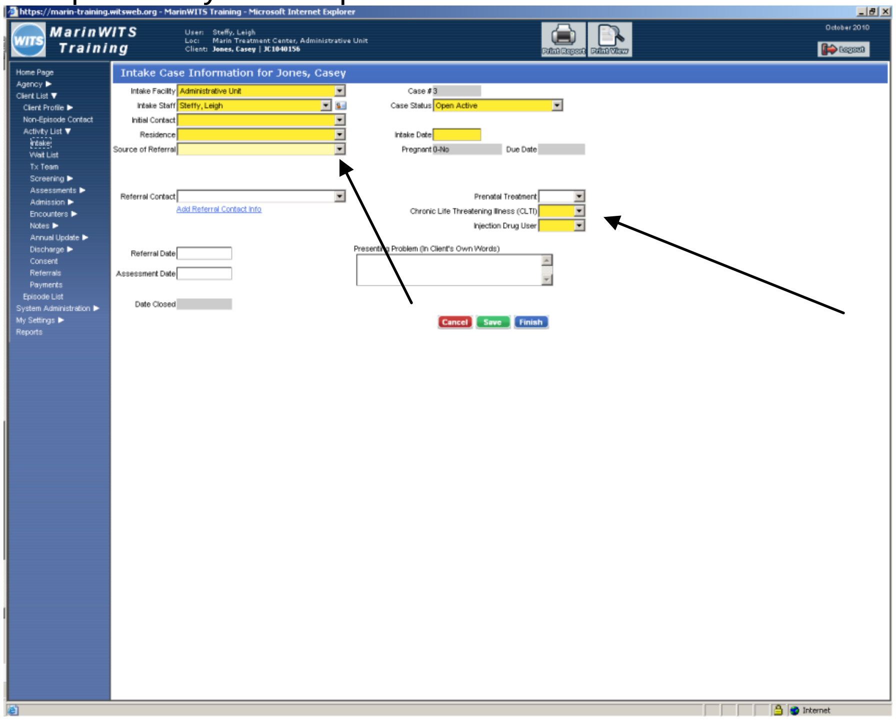
Once a client has a profile you can complete the intake form.
If you are already working on this client in the system, select Activity List from the left hand navigation bar. If you are not already working on the client, select the client from the Client List and click on the Activity List link.



If this is a new or previous client the Episode List will automatically open. Select the Start New Episode text from the right of the screen.



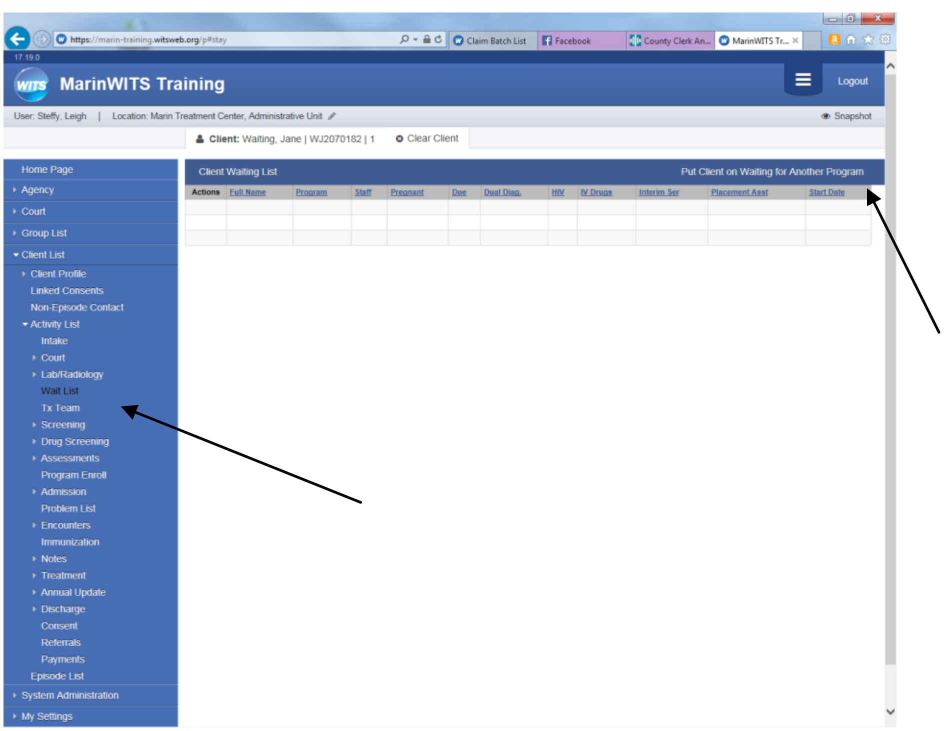
Complete the yellow required fields.



Click finish when you have completed at least the yellow fields.

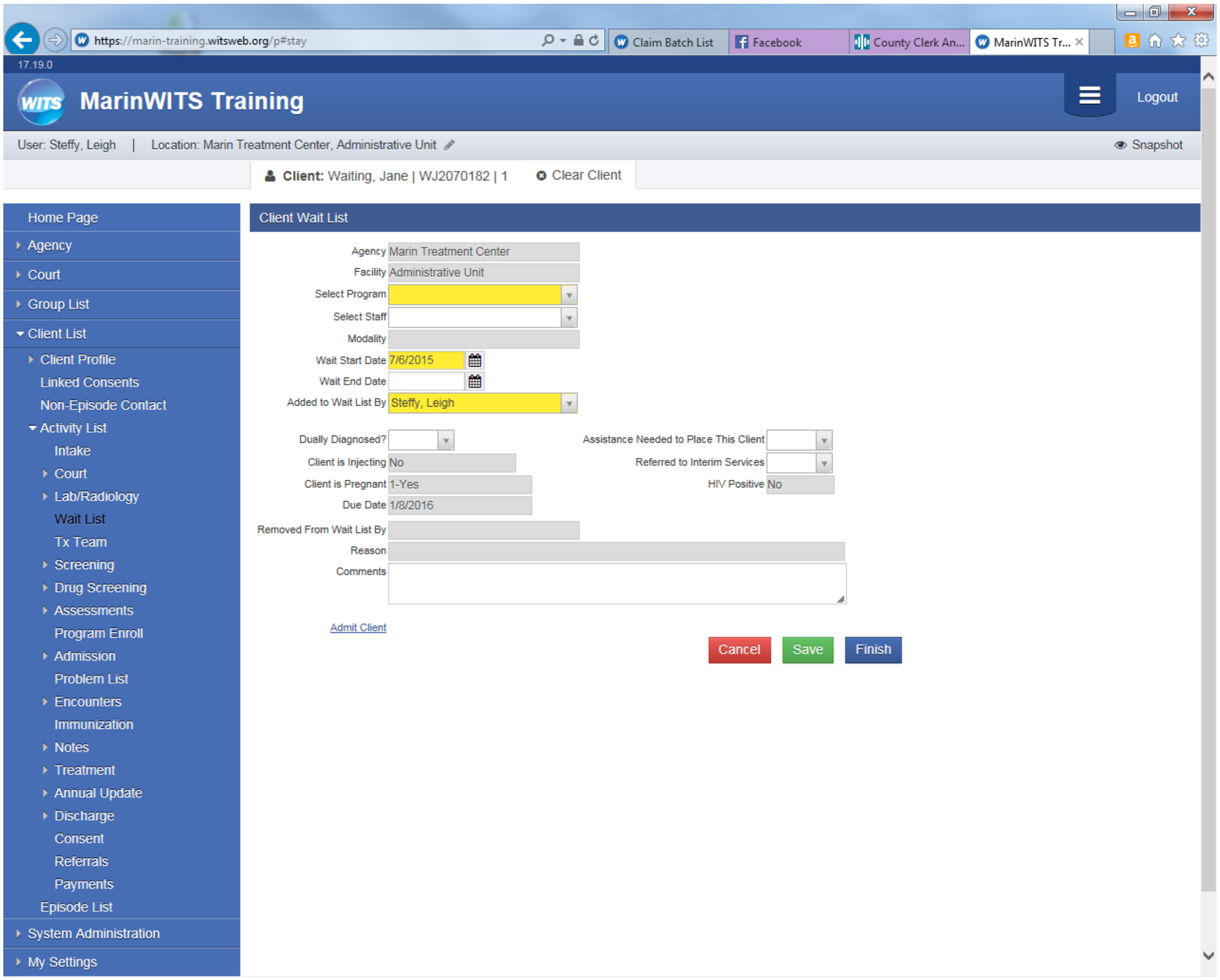
It is very important to correctly identify whether clients are pregnant, IV Drug Users or HIV + as the waitlist pulls the information from this page.

Now that the client has an intake, Select Waitlist from the left hand navigation bar



Click on the white hyperlink text “Put Client on Waiting List for Another Program.

Complete the following sections of the waitlist:



Selct Program: This will give a list of programs offered by your agency.

Wait Start Date: This is the intake date or date of first request for services.

Please be sure to complete both the Dually Diagnosed and the Referred to Interim Services dropdowns. Please remember that all priority populations must be provided with interim services during their waitlist.

Click Finish when you have completed this section.

The client will now appear on the agency waitlist. Each client has a unique identifier and each type of priority population can easily be identified and will be displayed at the top of the Waitlist.