Substance Use Disorder Information System

Communication Release

07/9/2026

Electronic Release of Information (ROI) Forms in Sage-PCNX LIVE

The electronic versions of SAPC's updated Release of Information (ROI) forms are now available in Sage-PCNX LIVE.

	ROI for Payment and Operations	/ Avatar PM / Client Management / Disclosure Man...
	ROI for Treatment and Care Coordination	/ Avatar PM / Client Management / Disclosure Man...
	ROI for Legal Proceedings	/ Avatar PM / Client Management / Disclosure Man...

Primary and Secondary Providers are encouraged to complete the ROI forms in Sage-PCNX as it will allow Sage users easier visibility on which ROI forms have been completed. The electronic ROI for Payment and Operations is a non-Episodic form, meaning if any treatment provider completes it in Sage, it will apply to all agencies within the network.

Providers may continue to use the paper ROIs. If paper ROIs are used, they are required to be uploaded to Sage for both Primary and Secondary Providers. Either paper or electronic Sage ROIs may be used to meet ROI requirements for disclosure.

SAPC's ROI Printout Report in Sage-PCNX LIVE

Each electronic ROI in Sage has an accompanying Printout. When records are disclosed, providers should attach the respective printout to accompany the disclosed records. 42 CFR part 2, § 2.32, requires each disclosure to be accompanied by a notice of unauthorized use and disclosure, and a copy of the consent. The paper and Printout versions of the SAPC ROI forms already include a Notice to Accompany Disclosures section.

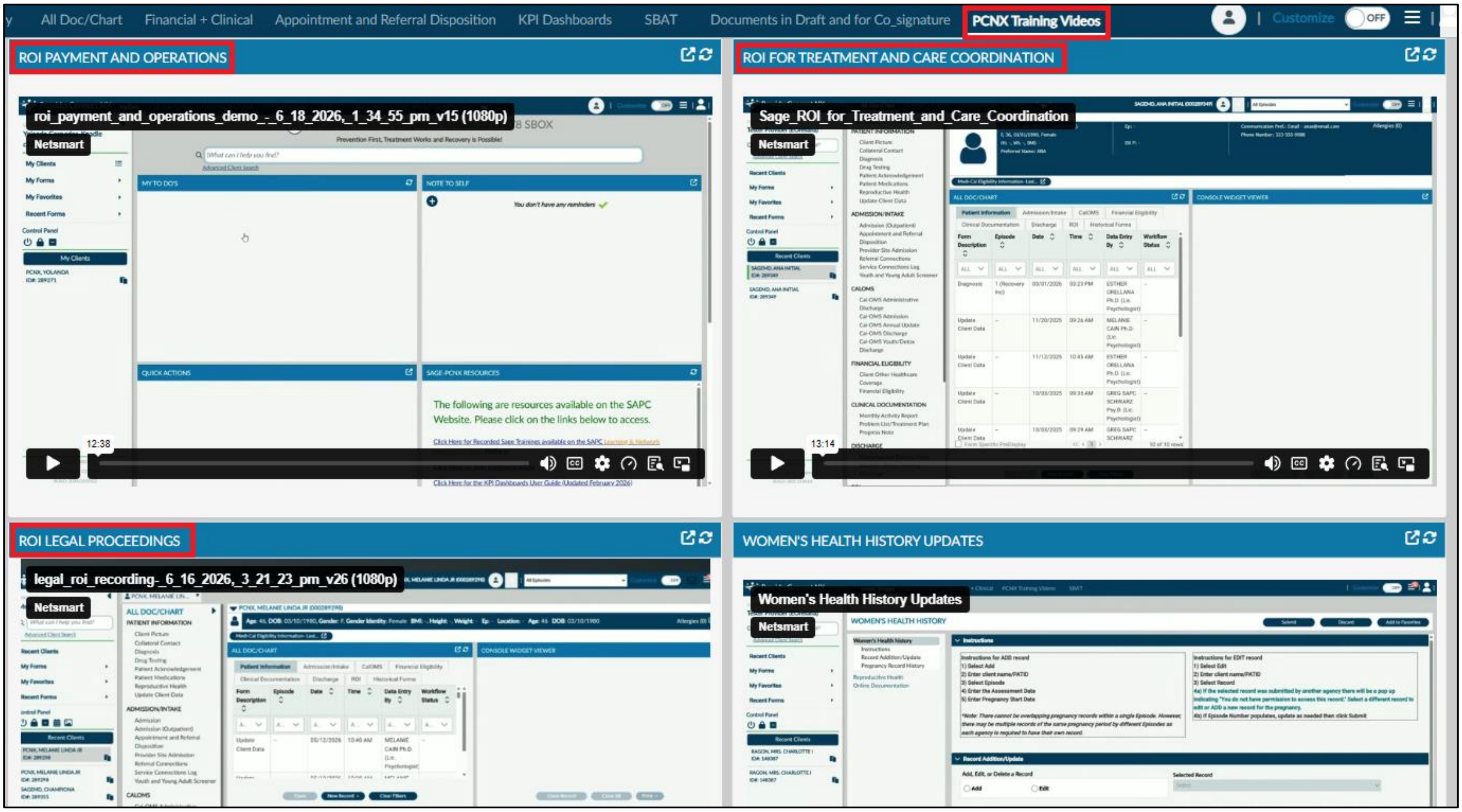
	ROI For Treatment and Care Coordination Printout	/ Avatar PM / PM Reports
	ROI for Payment and Operations Printout	/ Avatar PM / PM Reports
	ROI for Legal Proceedings Printout	/ Avatar PM / PM Reports

Sage Release of Information (ROI) Guide

SAPC has published the Sage Release of Information (ROI) Guide to aid Sage users in completing the newly available electronic ROIs in Sage. The guide provides a description of each field per form as well as how to view completed records. The guide is available on the SAPC Sage Website under Sage Trainings. Each ROI has built in specialty logic which is explained in the guide.

Sage ROI Instructional Videos in Sage-PCNX LIVE

Short **instructional videos** for each ROI are available in Sage-PCNX LIVE on the PCNX Training Video View. These videos are also available in the TRAIN environment.



Non-Episodic ROI for Payment and Operations

The electronic ROI for Payment and Operations form is non-episodic, meaning it is not limited to a single provider agency/episode. As such, an active record is valid for the entire network. The paper SAPC Payment and Operations ROI form is also valid across the network. However, forms uploaded through Provider File Attach do not allow for cross-agency visibility. Providers using the paper form should not assume there is one on record for a different agency. Therefore, providers are strongly encouraged to have clients sign the electronic version of the ROI for Payment and Operations in Sage.

SAPC Release of Information (ROI) FAQ

Following the two SAPC ROI trainings, feedback from the Provider Advisory Committee, and provider emails, SAPC compiled a list of questions into an FAQ document. This document was categorized to group questions by topic.

- General Questions (not ROI specific)
- Upload ROI Forms Questions
- ROI for Payment and Operations Questions
- ROI for Legal Proceedings Questions
- ROI for Treatment and Care Coordination Questions
- In Custody Population
- Notice to Accompany Disclosures/Disclosure Accounting
- Agency Specific Forms

The SAPC Release of Information (ROI) FAQ will be available by Monday, July 13, 2026, on the SAPC website in the Manuals, Bulletins, and Forms section under the Clinical Tab, grouped with the Release of Information section. If questions are not addressed by the FAQ, please contact the Health Information Management (HIM) Section, SAPC-HIM@ph.lacounty.gov.

CalOMS Open Admission Episode Report

The CalOMS Open Admission Episode Report provides cross-provider visibility of a patient's open Cal-OMS Admissions. This report was originally based on the permissions given on the historical Release of Information_In Network form. This report was updated to take into account an active ROI for Treatment and Care Coordination form. The ROI for Treatment and Care Coordination is episodic, meaning that the report will populate based on your agency's submission of the form and will not include information from other SAPC agencies.

If the historical ROI is revoked and there is no active ROI for Treatment and Care Coordination, then the report will limit visibility on other episode information. The report will always show your own agency's information. When a client does not have an open Cal-OMS Admissions for any agency the report will populate with: **"There are no Open Admissions for this patient."** The message: "**No consents on File. Please contact the LA CalOMS Liaison for help**" will populate when there is no active ROI authorizing other agencies.

Cal-OMS Open Admission Episode Report

as of 7/14/2025

Patient Name: SAGEMD, ESTHER

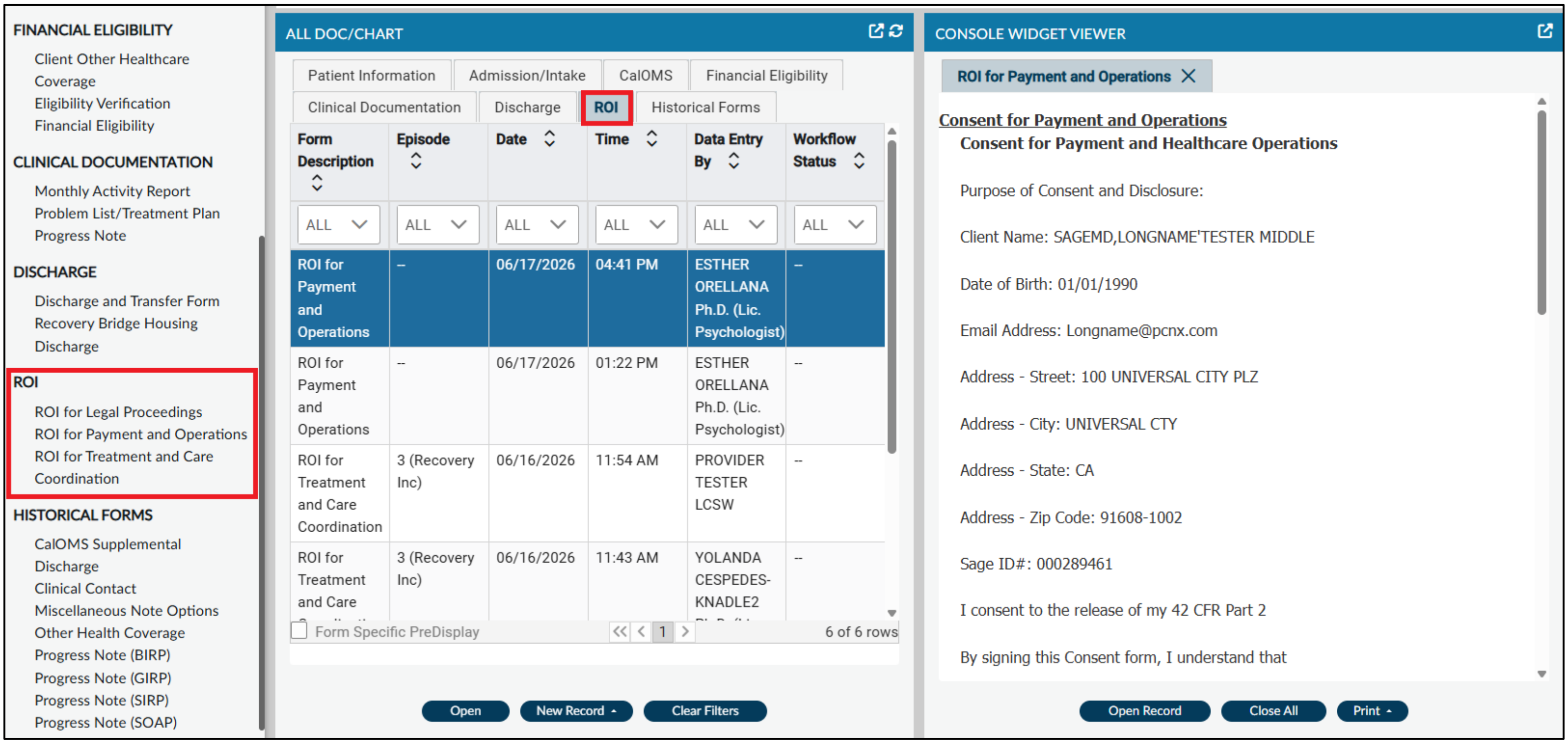
PATID: 289299

Provider: Recovery Inc

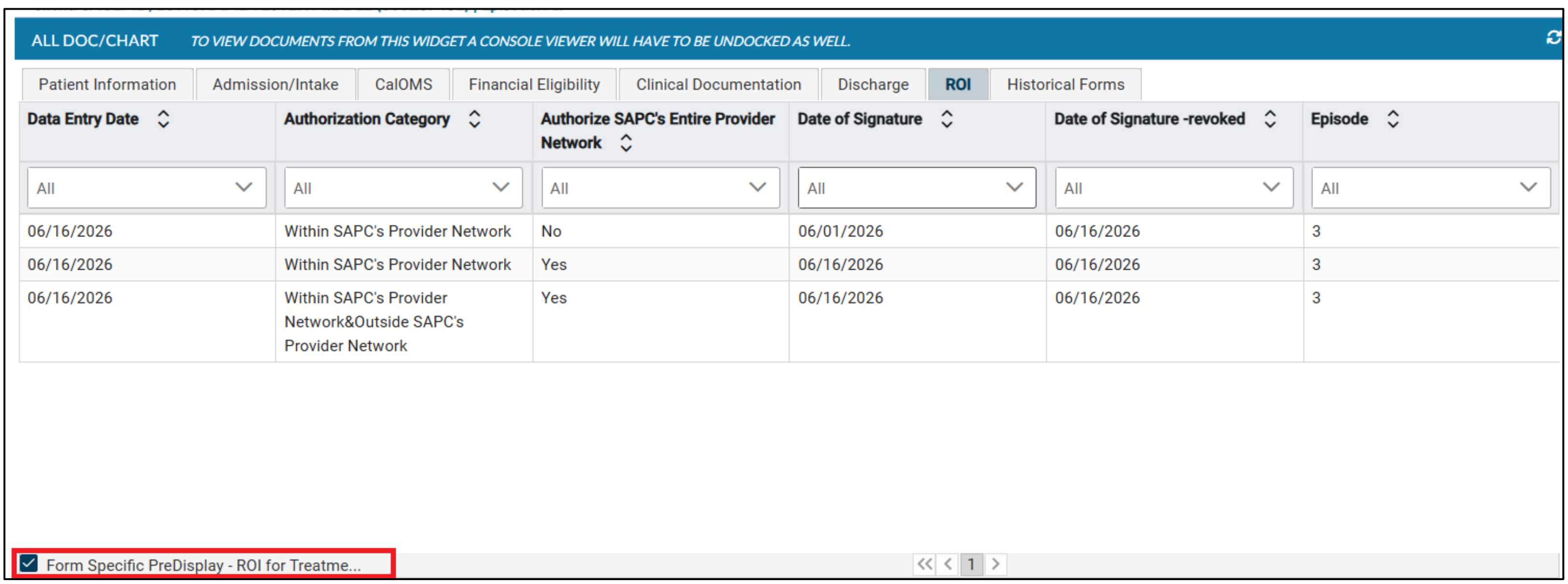
Episode	Episode Program	Cal-OMS Admission Date	Cal-OMS Location of Admission	Cal-OMS Level of Care Admitted
1	Recovery Inc	1/1/2023	Recovery Facility	Outpatient Services
2	No consents on File. Please contact the LA County CalOMS Liaison for help.			

All Doc/Chart View Updated

The All Doc/Chart view has been updated to include a section for ROIs.



When a single form is selected in "Form Description" the bottom "Form Specific PreDisplay" becomes enabled and users can note if there is a revocation date.



REMINDER: Extension of SAPC's ROI Forms Compliance

SAPC extended the date by which all clients must have SAPC's ROI forms on file to the following:

- Primary Providers: August 1st, 2026
- Secondary Providers: September 1st, 2026

Based on provider feedback, SAPC extended the deadlines to help providers better prepare for the changes and update their internal workflows to ensure compliance. This extension will also allow providers to work with their existing clients to ensure acquisition of client signatures on the new releases prior to the required compliance deadline.

The paper versions of SAPC's updated ROI forms are currently available in English and Spanish on the SAPC website under the Clinical tab on the [Manuals, Bulletins, and Forms] page. These new updated forms replaced the former In-Network and Out-of-Network ROI forms.

The **Supplemental Authorized Individuals/Entities for ROI form** is also available on the SAPC website under the Clinical tab on the [Manuals, Bulletins, and Forms] page in English and Spanish. This form may be used to add additional entries for entities authorized to share health information for the SAPC Treatment and Care Coordination ROI and SAPC Legal Proceedings ROI when using the SAPC paper ROI forms.