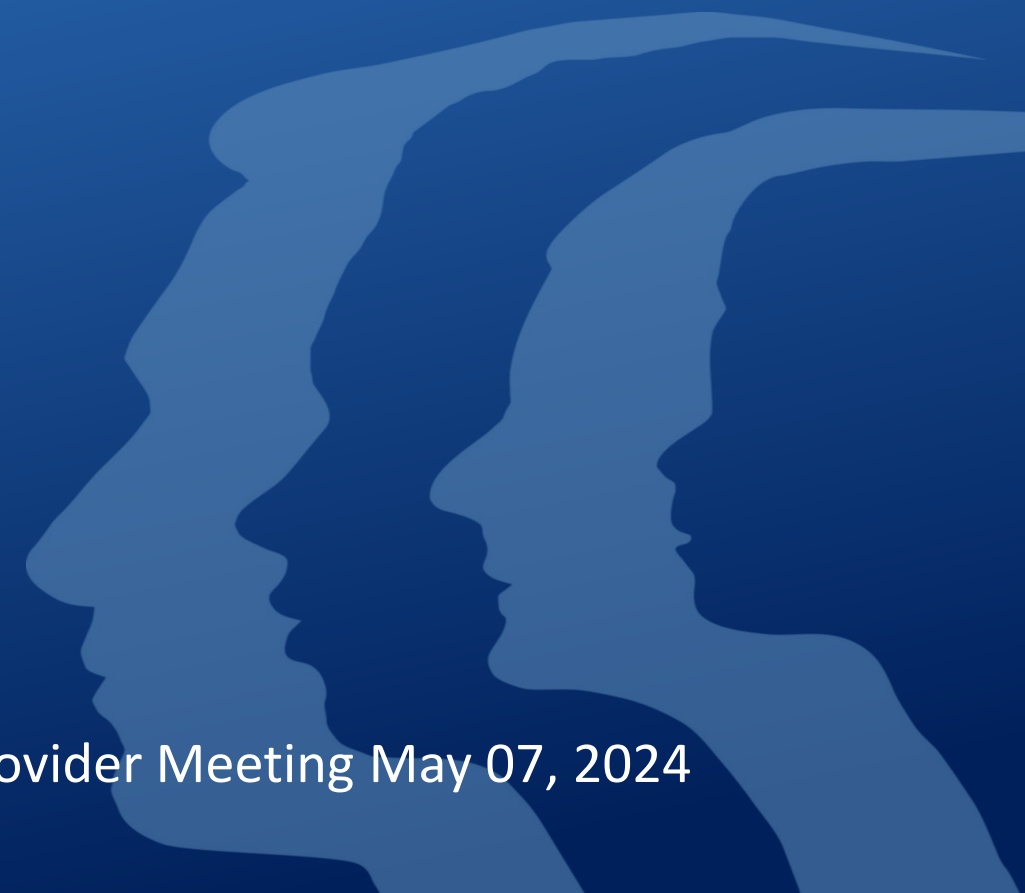




SAGE UPDATES

Los Angeles County Department of Public Health
Substance Abuse Prevention & Control

All Provider Meeting May 07, 2024



Provider Type Configuration Updates

Document Routing

Append Documents

Provider Site Admission workflow

Updated Attachments workflow



Sage and Secondary EHR Configurations



Profession(s) Type	Taxonomy	Modifier
LCSW, MFT or LPCCC Clinical Trainee	390200000X	AJ
Medical Student in Clerkship	174400000X	None
Nurse Practitioner/Clinical Nurse Specialist Clinical Trainee	390200000X	HP
Occupational Therapist Clinical Trainee	390200000X	CO
Pharmacist Clinical Trainee	390200000X	HO
Physician Assistant Clinical Trainee	390200000X	None
Psychiatric Technician Clinical Trainee	390200000X	HM
Psychologist Clinical Trainee	390200000X	AH
Registered Nurse Clinical Trainee	390200000X	TD
Vocational Nurse Clinical Trainee	390200000X	TE

New disciplines will be retroactive to 7/1/2023.

Trainee rates will be paid at the same rate as the licensed supervisor discipline rate

- I.e. Psychologist Clinical Trainee rate = Licensed Psychologist rate

The licensed supervisor NPI must be on the claim along with the NPI and taxonomy of the clinical trainee.

- Provider's responsibility to inform SAPC of the primary supervisor for each trainee via the User Modification request process.
- SAPC will configure supervisor NPI in Sage for both Primary and Secondary providers to include on claims to DHCS.
- Sage does not currently support the 2310D loop on the 837 for supervisor information, but should be available in CY Q3.



LET'S TALK EXCITING NEW FUNCTIONALITY



Document Routing

Enables the ability to send (route) certain forms for approver/supervisor approval, finalization and e-signature

Forms Enabled for Doc Routing

Discharge and Transfer form
Patient Medication
Problem List/Treatment Plan
Progress Note
Recovery Bridge Housing Discharge
Youth and Young Adult Screener

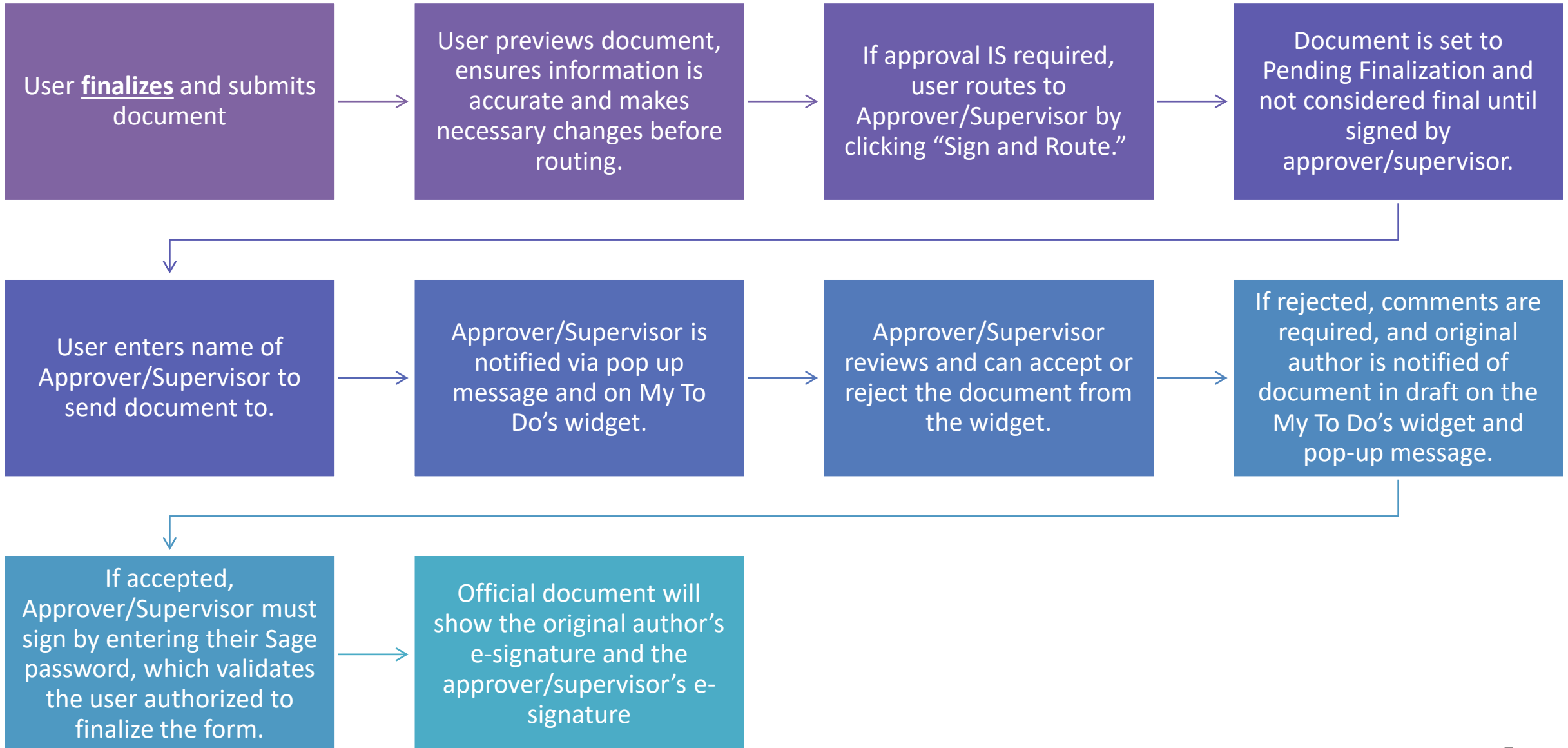
Functionality will be enabled in TRAIN by 5/31/2024 for providers to practice.

★ Training will be held on Monday 6/3/2024 from 9am-11am

[Register Here](#)

With LIVE implementation scheduled for release on or before 7/1/2024.

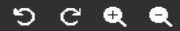
Document Routing- Suggested Workflow



New Process for Signing and Routing Documents



Confirm Document



← 1 of 4 →

Date Created: 04/16/2024 at 1124 PDT
Form Name: Progress Note
Client's Name: TEST,QIUM (000159908)
Client's DOB: 10/21/2005

COUNTY OF LOS ANGELES SAPC
1000 S FREMONT AVE
Alhambra, CA 91803

Progress Note

Date of Service:

04/16/2024

Program:

Recovery Facility (1)

Service Start Time:

0925

Service End Time:

1025

Sign

Sign and Route

Reject

Route Document to

Supervisor

ESTHER ORELLANA Ph.D (Lic. Psychologist) (OK)

Add

Team

Search here

Add

Add Approver*

Admitting Practitioner

Attending Practitioner

Add Users to Notify When Final

Admitting Practitioner

Attending Practitioner

MY TO DO'S



Documents to Sign

1

Approver/
Supervisor's
My To Do

Approver/Supervisor reviews the preview of the document and can reject or approve from the widget.

DOCUMENTS TO REVIEW

Queue Sort By:

Document Preview

QIUM TEST (000159908) EP: 1
Review: Progress Note
PsyD Greg Schwarz 04/16/2024

Accept Reject

Date Created: 04/16/2024
Form Name: Progress Note
Client's Name: TEST, QIUM (000159908)
Client's DOB: 10/21/2005

Progress Note

Date of Service:
04/16/2024

Program:
Recovery Facility (1)

Service Start Time:

Cancel Sign

QIUM TEST (000159908) EP: 1
Review: Progress Note
PsyD Greg Schwarz 04/28/2024

✖ Reject Undo ✎

Correct time of session.

Reject and add comment

QIUM TEST (000159908) EP: 1
Review: Progress Note
PsyD Greg Schwarz 04/28/2024

✔ Accept Undo ✎

Approved as is. No edits.

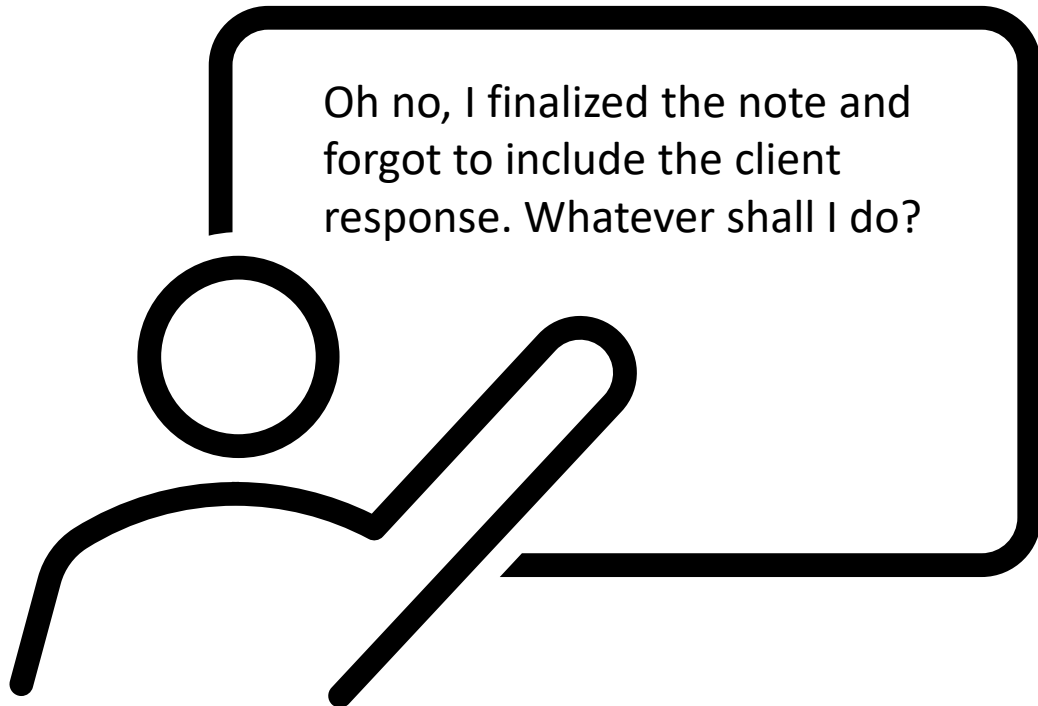
Date Created: 04/28/2024 at 1539
Form Name: Progress Note
Client's Name: TEST, QIUM (000159908)
Client's DOB: 10/21/2005

Verify Password

Password
Enter Password

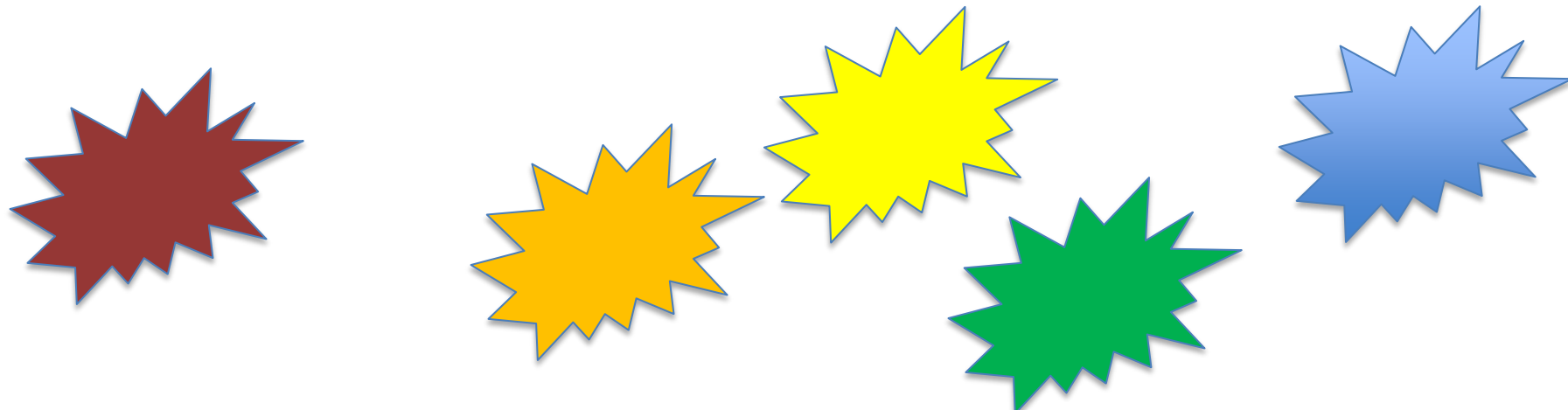
Verify Cancel

Accept and sign with password verification

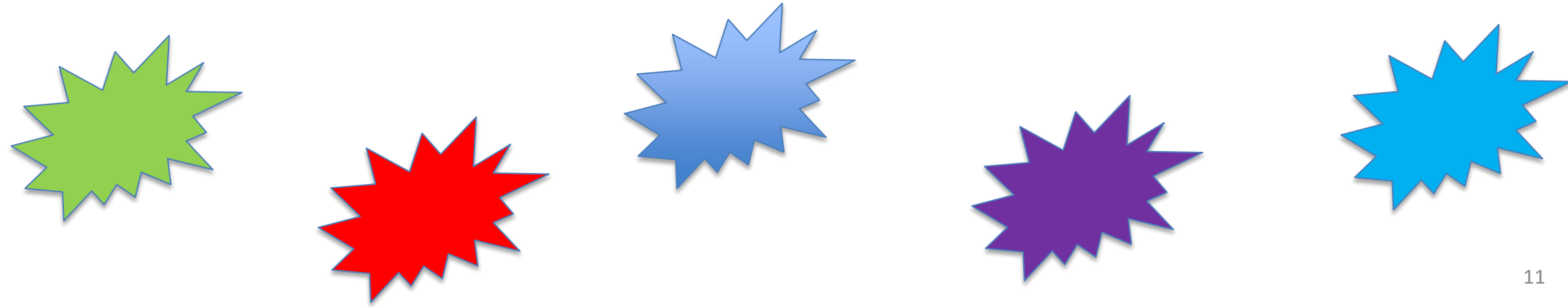


Oh no, I finalized the note and forgot to include the client response. Whatever shall I do?

Introducing...



Append Documents



What is the Append Function?

Allows original author and supervisors to add official entries to the medical record without editing/modifying the original note.

Available on forms that have been Document Routing enabled.

Discharge and Transfer form, Patient Medication, Problem List/Treatment Plan, Progress Note, Recovery Bridge Housing Discharge, Youth and Young Adult Screener

Important Caveats to Appending



Appending does not edit the original document

- The original document remains intact and finalized.
- Appending does allow for the user to update the content of clinical documentation easily without the need for a helpdesk ticket.

Appended documents do not populate to any reports from the appended form.

- If fields on the form need to be corrected that populate to reports, a medical record modification request should still be submitted to the helpdesk.
- I.e. Progress Note Status report used for billing will not reflect any information in the appended note section.

Append in PCNX



The Append Documents form will automatically open and prepopulate the information from the selected note.

PATIENT CHART FORMS

Patient Info Admission/Intake Cal-OMS Financial Eligibility

Clinical Documentation Discharge Authorization(DO NOT USE IN LIVE)

Form Description	Episode	Date	Time	Data Entry By	Workflow Status
Progress Note	1 (Recovery Inc)	04/30/2024	-	Daniel Suhay	Final
Problem List/Treatment Plan	1 (Recovery Inc)	04/30/2024	-	Daniel Suhay	Final
Progress Note	1 (Recovery Inc)	04/29/2024	-	Daniel Suhay	Draft
Progress Note	1 (Recovery Inc)	04/28/2024	-	GREG SAPC SCHWARZ Psy.D (Lic. Psychologist) GREG SAPC	Final

Form Specific PreDisplay 43 of 43 rows

Open Record Close All Print **Append**

TEST, QIUM (000159908)

TEST, QIUM (000159908)
F, 18, 10/21/2005, Test other gender
Preferred Name: -
Personal Pronouns: She/Her/Hers

Ep: -
DX P: -
Facility Chart#: 2244

Location: -
Communication Pref.: -
Phone #: -

Allergies (0)

APPEND DOCUMENTS Submit Discard Add to Favorites

Append Document

Online Documentation

Form Type: Progress Note

Entity: TEST, QIUM (159908)

From Date: 04/30/2024 To Date: 04/30/2024

List of Documents: Option: Progress Note Date Created: 04/30/2024 Time Created: 12:08PM (228)

Display Document

New Comments to Be Appended to the Original Document *

From the All Doc/Chart view, select the note then select Append



The appended note will be added to the bottom of the document and part of the official record.

Date Appended: 04/10/2024 at 1147 PDT
Form Name: Progress Note
Client's Name: TEST,QIUM (000159908)
Client's DOB: 10/21/2005

COUNTY OF LOS ANGELES SAPC
1000 S FREMONT AVE
Alhambra, CA 91803

Testing append function.

-----ADDITIONAL NOTE-----

Electronically Signed by: GREG SAPC SCHWARZ Psy.D (Lic. Psychologist) on 04/10/2024 at 1147 PDT Appended Author

Correcting or adding info to the content or narrative of clinical documents

Correcting errors to fields that are not used for billing

Number of members in a group corrections (as this no longer required on a claim)

To Append or Not to Append, that is the question... whether it is better to “Final to Draft” *or* “Nobler to Append”

Final to Draft

- Billing information
 - Note date
 - Service start and end times
 - Duration
 - Program Site
 - Location
 - Provider rendering service

Append

- Non billing related fields
 - Appends will not populate to the Progress Note Status Report
- Free text fields can be appended



NEW Provider Site Admission:

Tracking Admissions and Readmissions in Sage-PCNX



Patient enters
or
re-enters
Treatment

Provider admits
patient into Sage
using Admission
(Outpatient) as
needed,
completes all
other required
forms.

Completes NEW
**Provider Site
Admission** form
(only 3 fields)

Medical
Necessity
determined
and
authorization
approved for a
LOC

Patient completes
treatment and
provider completes
the Discharge and
Transfer form
and/or RBH
Discharge form in
Sage.

Purpose and Benefit

When the Provider Site Admission form and corresponding Discharge form are completed, it will provide exact program site, dates and level of care of a patient's treatment episode.

Data will be pulled on a New Census Report that will be available in Sage-PCNX.

This will allow providers and SAPC to track capacity, program status by site, availability and other metrics where program enrollment is needed.

Requires minimal additional data entry

- Only 3 fields on the **Provider Site Admission** form.
- Quickly enter valuable information that can be used for later program metrics, reporting or census information

Admission Date	Program *
04/24/2024	Recovery Facility (1)
	Level of Care Admitted *
	ASAM 3.1

- To compliment the new Provider Site Admission form, the Discharge and Transfer Form has been updated to now have a Level of Care Discharged field.
- Simply complete the new Level of Care Discharged field with the same LOC from the Provider Site Admission

Level of Care Discharged *
ASAM 3.1 ✕ ▼



Provider File Attach Updates



New and Improved Attachment Tracking and Visibility

SAPC has updated the Provider File Attach fields to include a plethora of options that will allow providers to more accurately attach documents to a chart.

These new fields will allow providers and SAPC to easily search for and identify different types of attachments per patient.

Additionally, SAPC will be creating a report to allow providers to search for all attachments by either patient, File Type, Document Type or by Provider agency as a whole.

This will assist with potential incentive program metrics or any other reporting needs that are based on attachments.

Updated Provider File Attach Workflow



File Type *

ASAM

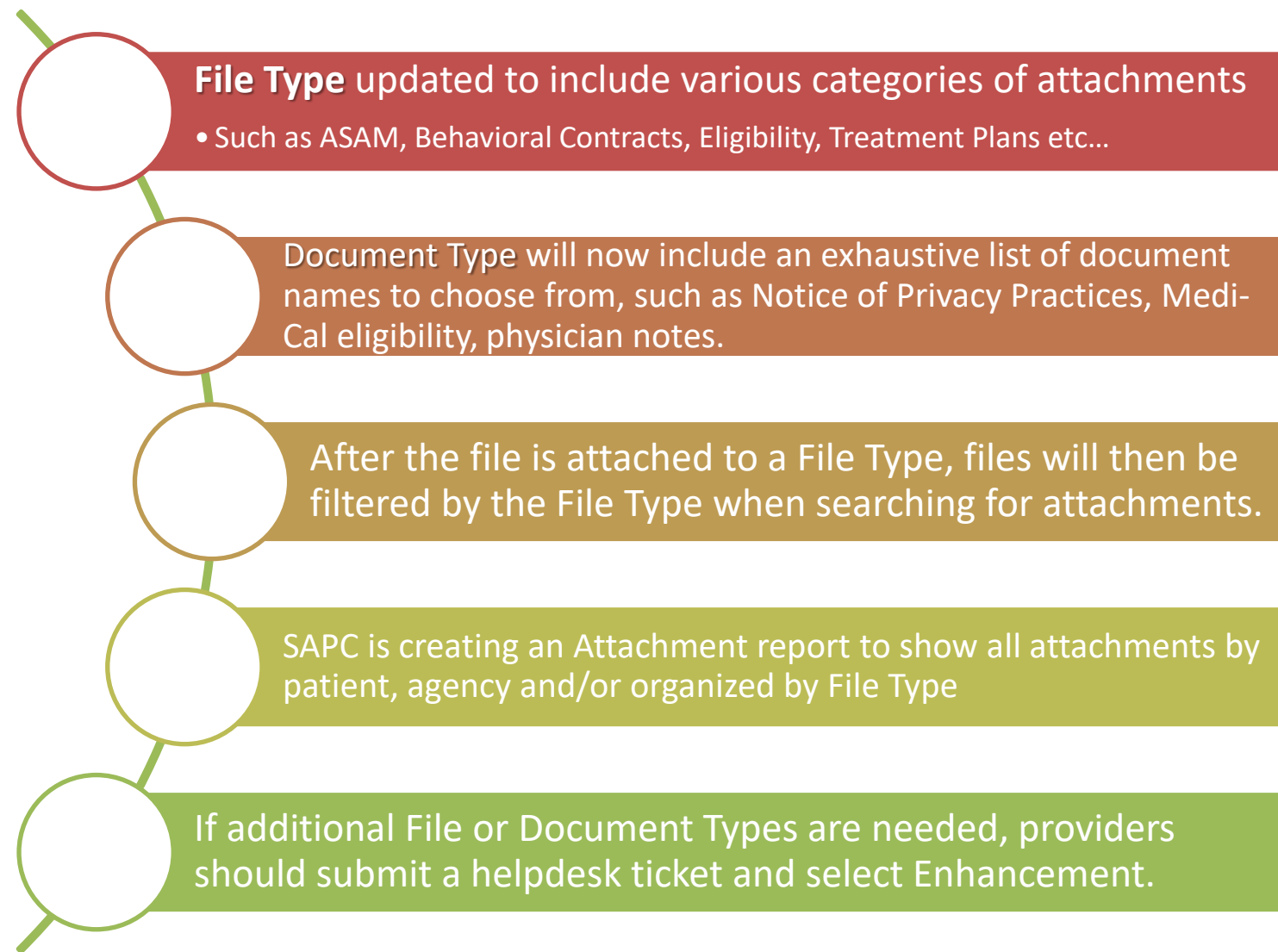
Authorization

Select

Document Type (REQUIRED)

ASAM Comprehensive

Upload File



All new forms, functions, reports and widgets will be updated in TRAIN first to allow providers time to practice and provide feedback.



SAPC will announce when an update has been added to TRAIN for provider feedback during provider meetings, the Sage provider communication and the PCNX message board as applicable.



We welcome your feedback!

Feedback should be sent to Sage@ph.lacounty.gov

Reminder, feedback received prior to implementing in LIVE will greatly enhance the workflows and avoid future issues.

Batch Status Report

- The Batch Status Report was updated to support future workflow implementations. It now has updated formatting and updated fields including Performing Provider, ADP message, and EOB.

Service Authorization Request Form

- Three (3) new fields were added to the Doc Request Date subsection.
 - Clinical Contact,
 - Phone Number, and
 - Additional Contact Information
- This will allow providers to enter the most appropriate person to contact per each authorization and improve the contact process.
- The Authorization Status-Last 3 Months was also updated to include comments and funding source to help expedite the authorization process.

Progress Note Printout

- This report is a printout of the Progress Note record(s). Like the Problem List/Treatment Plan Printout, this report will show the electronic signatures for Draft and Final Submission.

Provider Site Admission

- A new form was created with only three (3) fields to indicate when a patient was admitted to a specific site and specific LOC.
- This form in combination with the Discharge and Transfer Form and Recovery Bridge Housing Discharge form will help generate reports related to the number of admissions in a given period, a census count, and length of stay.
- Additional documentation will be provided once Providers have had the opportunity to provide feedback.

Discharge and Transfer Form

- This form was updated to remove questions that are no longer relevant and substituted to align with current policies.
- A correction was made that prohibited users from selecting other Providers when the patient was transferred.
- A new field, Level of Care Discharged, was added.
- These changes are in preparation for new reports.

Provider File Attach Updates

- New File Type Categories
- New Document Type specific document names

CST Training Highlights



Name of Training	Date & Time	Link to flyer for registration
Connecting LPHA Clinical Documentation to Medi-Cal Codes	Thursday 5/16/24 9:00am-11:30am	http://publichealth.lacounty.gov/sapc/calendar/May2024/LPHA051624.pdf
Connecting Clinical Documentation to Medi-Cal Codes for Counselors and Certified Peers	Thursday 5/23/24 9:00am-11:30am	http://publichealth.lacounty.gov/sapc/calendar/May2024/SUDCounselor052324.pdf
CaAIM Documentation Requirements Updates	Monday 5/20/24 10:00am-12:15pm	http://publichealth.lacounty.gov/sapc/calendar/May2024/CalAIM052024.pdf
Transforming Substance Use Treatment with Radical Hospitality	Tuesday 5/21/24 9:00am-12:15pm	http://publichealth.lacounty.gov/sapc/calendar/Jun2024/HarmReduction061824.pdf
Substance Use Treatment for Criminal Justice Populations	Wednesday 5/29/24 8:30am-12:30pm	http://publichealth.lacounty.gov/sapc/calendar/May2024/CriminalJustice052924.pdf
Developing a Plan of Care for Substance Use Providers: CaAIM Requirements and Best Practices	Thursday 5/30/24 8:30am-12:30pm	http://publichealth.lacounty.gov/sapc/calendar/May2024/CarePlanning053024.pdf
Re-Imagining Harm Reduction in Substance Use Treatment	Tuesday 6/18/24 9:00am-11:45am	http://publichealth.lacounty.gov/sapc/calendar/Jun2024/HarmReduction061824.pdf
Fortifying Your Strength: Promoting Self-Care for Substance Use Treatment Providers	Thursday 6/27/24 9:00am-12:15pm	http://publichealth.lacounty.gov/sapc/calendar/Jun2024/SelfCare062724.pdf



For a list of more trainings available and the SAPC Training Calendar please visit or scan QR Code:
[LA County Department of Public Health - Substance Abuse Prevention and Control - SAPC Trainings](http://publichealth.lacounty.gov/sapc/trainings)