

## Sage – File Attachments Standardized Naming Convention

Standardized and appropriate naming of file attachments within Sage helps to organize documents. It also helps users identify required documentation in the system at a later time.

**Providers are expected to use the following format to name files when uploading attachments into Sage:**

- [Type of Document]-[Date (MM-DD-YY)]-[Patient’s First & Last Initial]-[Patient ID]
  - Note: “Date (MM-DD-YY)” indicates when the document was *COMPLETED*, NOT the date attachment was uploaded.
- File names are limited to 150 characters, and the following characters are NOT allowable in the file name: “.:\*?<>/|\”

The table below provides naming convention examples for Sage file attachments.

Type of Attachment	Naming Convention
Patient Handbook Summary	<b>PtHandbook</b> -(05-24-18)-JD-ID999999
ASAM Assessment	<b>ASAM</b> -(05-24-18)-JD-ID999999
Problem List	<b>Problem List Main</b> -(05-24-22)-JD-ID999999
Problem List Addendum	<b>Problem List Addendum</b> -(05-24-22)-JD-ID999999
Treatment Plan	<b>TxPlan</b> -(05-24-18)-JD-ID999999
Miscellaneous Note	<p><b>MiscNote_“Type”</b>-(05-24-18)-JD-ID999999</p> <ul style="list-style-type: none"> <li>○ <u>Note:</u> “MiscNote_“Type”” should identify the specific type of Miscellaneous Note being uploaded; for example:               <ul style="list-style-type: none"> <li>○ MiscNote_CaseManagement-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_MedicalNecessity-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_Preg/Parenting Women-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_NoShow-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_CaseReview-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_CaseConference-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_CareCoord-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_Assessment-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_TxPlanRev/TxPlanDev-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_DCPlanning/DCSummary-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_FamilyTherapy-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_Skills Development-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_Disciplinary Actions-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_Six/Twelve Month Justification-(05-24-18)-JD-ID999999</li> <li>○ MiscNote_Miscellaneous Note-(05-24-18)-JD-ID999999</li> </ul> </li> </ul>
Client Consent Form / Release of Information <i>(signed by patient for information sharing purposes)</i>	<b>ClientConsent</b> -(06-04-18)-JD-ID999999
Court Order	<b>CourtOrder</b> -(05-24-18)-JD-ID999999

Criminal Justice Document <i>(e.g., AB-109 or START forms, minute orders, etc)</i>	<b>CJDocument_“Type”-(05-24-18)-JD-ID999999</b> <ul style="list-style-type: none"> <li>○ <u>Note:</u> “CJDocument_“Type”” should identify the specific type of Criminal Justice document being uploaded; for example: <ul style="list-style-type: none"> <li>○ CJDocument_AB109-(05-24-18)-JD-ID999999</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>○ CJDocument_START-(05-24-18)-JD-ID999999</li> <li>○ CJDocument_MinOrder-(05-24-18)-JD-ID999999</li> </ul>
Discharge/Transfer Form	<b>DischargeTransferForm-(05-24-18)-JD-ID999999</b>
Drug Test Form	<b>DrugTestForm-(05-24-18)-JD-ID999999</b>
Justification Note <i>(e.g., ASAM discrepancy, DSM-5 diagnosis, level of care, need for ongoing services)</i>	<b>JustificationNote_“Type”-(05-24-18)-JD-ID999999</b> <ul style="list-style-type: none"> <li>○ <u>Note:</u> “JustificationNote_“Type”” should identify the specific type of justificationdocumentation being uploaded; for example: <ul style="list-style-type: none"> <li>○ JustificationNote_ASAMDiscrepancy-(05-24-18)-JD-ID999999</li> <li>○ JustificationNote_DSM5Diagnosis-(05-24-18)-JD-ID999999</li> <li>○ JustificationNote_LOC-(05-24-18)-JD-ID999999</li> <li>○ JustificationNote_NeedForOngoingServices-(05-24-18)-JD-ID999999</li> </ul> </li> </ul>
Progress Note	<b>ProgressNote-(05-24-18)-JD-ID999999</b>
Lab Test	<b>“Name of Lab Test”-(05-24-18)-JD-ID999999</b> <ul style="list-style-type: none"> <li>○ <u>Note:</u> “Name of Lab Test” should identify the specific lab type being uploaded (e.g., “LiverTests”, “HepScreen”, etc)</li> </ul>
Physical Health Note	<b>PHNote-(05-24-18)-JD-ID999999</b>
Mental Health Note	<b>MHNote-(05-24-18)-JD-ID999999</b>
Proof of Pregnancy	<b>ProofOfPregnancy-(05-24-18)-JD-ID999999</b>
Verification of Outpatient Treatmentfor RBH <i>(e.g., letter from outpatient provider)</i>	<b>OutpatientTx_Verfication-(05-24-18)-JD-ID999999</b>
Other Health Coverage (OHC) Support	<b>OHCSupport-(12-12-20_12-12-21)-JD-ID999999</b> <ul style="list-style-type: none"> <li>○ <u>Note:</u> The dates in the parentheses should indicate which dates of service are covered by the EOB or denial letter. The first date should be the first date of service and the second date should be the last date of service covered by the document.</li> </ul>
Other	<b>“Identifier”-(05-24-18)-JD-ID999999</b> <ul style="list-style-type: none"> <li>○ <u>Note:</u> For “Identifier”, providers should use their best judgment to name thedocument according to the best naming convention that will facilitate clear identification and organization in the future; for example: <ul style="list-style-type: none"> <li>○ PatientRights-(05-24-18)-JD-ID999999</li> <li>○ NoticeofPrivacyPractices-(05-24-18)-JD-ID999999</li> <li>○ ProgramAgreement-(05-24-18)-JD-ID999999</li> </ul> </li> </ul>