

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:

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	PtHandbook -(05-24-18)-JD-ID999999
ASAM Assessment	ASAM -(05-24-18)-JD-ID999999
Treatment Plan	TxPlan -(05-24-18)-JD-ID999999
Miscellaneous Note	MiscNote_“Type” -(05-24-18)-JD-ID999999 <ul style="list-style-type: none"> ○ <u>Note:</u> “MiscNote_“Type”” should identify the specific type of Miscellaneous Note being uploaded; for example: <ul style="list-style-type: none"> ○ MiscNote_CaseManagement-(05-24-18)-JD-ID999999 ○ MiscNote_MedicalNecessity-(05-24-18)-JD-ID999999 ○ MiscNote_Preg/Parenting Women-(05-24-18)-JD-ID999999 ○ MiscNote_NoShow-(05-24-18)-JD-ID999999 ○ MiscNote_CaseReview-(05-24-18)-JD-ID999999 ○ MiscNote_CaseConference-(05-24-18)-JD-ID999999 ○ MiscNote_CareCoord-(05-24-18)-JD-ID999999 ○ MiscNote_Assessment-(05-24-18)-JD-ID999999 ○ MiscNote_TxPlanRev/TxPlanDev-(05-24-18)-JD-ID999999 ○ MiscNote_DCPlanning/DCSummary-(05-24-18)-JD-ID999999 ○ MiscNote_FamilyTherapy-(05-24-18)-JD-ID999999 ○ MiscNote_Skills Development-(05-24-18)-JD-ID999999 ○ MiscNote_Disciplinary Actions-(05-24-18)-JD-ID999999 ○ MiscNote_Six/Twelve Month Justification-(05-24-18)-JD-ID999999 ○ MiscNote_Miscellaneous Note-(05-24-18)-JD-ID999999
Client Consent Form / Release of Information <i>(signed by patient for information sharing purposes)</i>	ClientConsent -(06-04-18)-JD-ID999999
Court Order	CourtOrder -(05-24-18)-JD-ID999999
Criminal Justice Document <i>(e.g., AB-109 or START forms, minute orders, etc)</i>	CJDocument_“Type” -(05-24-18)-JD-ID999999 <ul style="list-style-type: none"> ○ <u>Note:</u> “CJDocument_“Type”” should identify the specific type of Criminal Justice document being uploaded; for example: <ul style="list-style-type: none"> ○ CJDocument_AB109-(05-24-18)-JD-ID999999

	<ul style="list-style-type: none"> ○ CJDocument_START-(05-24-18)-JD-ID999999 ○ CJDocument_MinOrder-(05-24-18)-JD-ID999999
Discharge/Transfer Form	DischargeTransferForm -(05-24-18)-JD-ID999999
Drug Test Form	DrugTestForm -(05-24-18)-JD-ID999999
Justification Note <i>(e.g., ASAM discrepancy, DSM-5 diagnosis, level of care, need for ongoing services)</i>	JustificationNote_“Type” -(05-24-18)-JD-ID999999 <ul style="list-style-type: none"> ○ <u>Note</u>: “JustificationNote_“Type”” should identify the specific type of justification documentation being uploaded; for example: <ul style="list-style-type: none"> ○ JustificationNote_ASAMDiscrepancy-(05-24-18)-JD-ID999999 ○ JustificationNote_DSM5Diagnosis-(05-24-18)-JD-ID999999 ○ JustificationNote_LOC-(05-24-18)-JD-ID999999 ○ JustificationNote_NeedForOngoingServices-(05-24-18)-JD-ID999999
Progress Note	ProgressNote -(05-24-18)-JD-ID999999
Lab Test	“Name of Lab Test” -(05-24-18)-JD-ID999999 <ul style="list-style-type: none"> ○ <u>Note</u>: “Name of Lab Test” should identify the specific lab type being uploaded (e.g., “LiverTests”, “HepScreen”, etc)
Physical Health Note	PHNote -(05-24-18)-JD-ID999999
Mental Health Note	MHNote -(05-24-18)-JD-ID999999
Proof of Pregnancy	ProofOfPregnancy -(05-24-18)-JD-ID999999
Verification of Outpatient Treatment for RBH <i>(e.g., letter from outpatient provider)</i>	OutpatientTx_Verfication -(05-24-18)-JD-ID999999
Other	“Identifier” -(05-24-18)-JD-ID999999 <ul style="list-style-type: none"> ○ <u>Note</u>: For “Identifier”, providers should use their best judgment to name the document according to the best naming convention that will facilitate clear identification and organization in the future; for example: <ul style="list-style-type: none"> ○ PatientRights-(05-24-18)-JD-ID999999 ○ NoticeofPrivacyPractices-(05-24-18)-JD-ID999999 ○ ProgramAgreement-(05-24-18)-JD-ID999999