Sage KPI Dashboards Overview Guide

Images shared in this guide are from test data and do not include any protected health information (PHI).

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Introduction

Key Performance Indicators (KPI) are quantifiable measures based on a set of data. For Sage, KPIs reflect clinical, financial, and operational data. SAPC's KPI Dashboards allow SAPC and Network Providers alike to view data in visual representations and dynamic tables. KPI Dashboards may be used for data analysis including metric monitoring.

Data is stored and uploaded nightly, rather than in real-time.

Protected Health Information (PHI)

The KPI Dashboards have a wealth of program information including PHI. It is the responsibility of every user to ensure PHI is appropriately accessed and/or stored in compliance with the Health Information Portability Accountability Act (HIPAA) as well as 42 CFR part 2. PHI includes any data point associated with a patient including but not limited to name, address, phone number, diagnosis, treatment start date, and service dates. Security safeguards to help prevent a breach of PHI include, but are not limited to, restricting access to KPI.

Pre-requisites for KPI access

Not all Network Provider staff will have access to KPI Dashboards. The following conditions must be met to access KPI:

1. User must be setup in Sage
2. Access to KPI must be specifically requested for each user in addition to general Sage access.

Adding or changing user access to KPI Dashboards is managed through the standard Sage Onboarding process. Access to KPI must be approved by the agency's Sage Liaison.

Once approved, KPI Dashboards may be accessed either through a URL link provided when approved for access or through the KPI Dashboards view within Sage.

**Note: the recommended browser for KPI Dashboards is Microsoft Edge.*

Troubleshooting

For assistance with login issues or issues noted within the dashboards, please open a Sage Help Desk ticket.

- Sage Help Desk Phone Number: (855) 346-2392
- Sage Help Desk ServiceNow Portal: https://netsmart.service-now.com/plexussupport

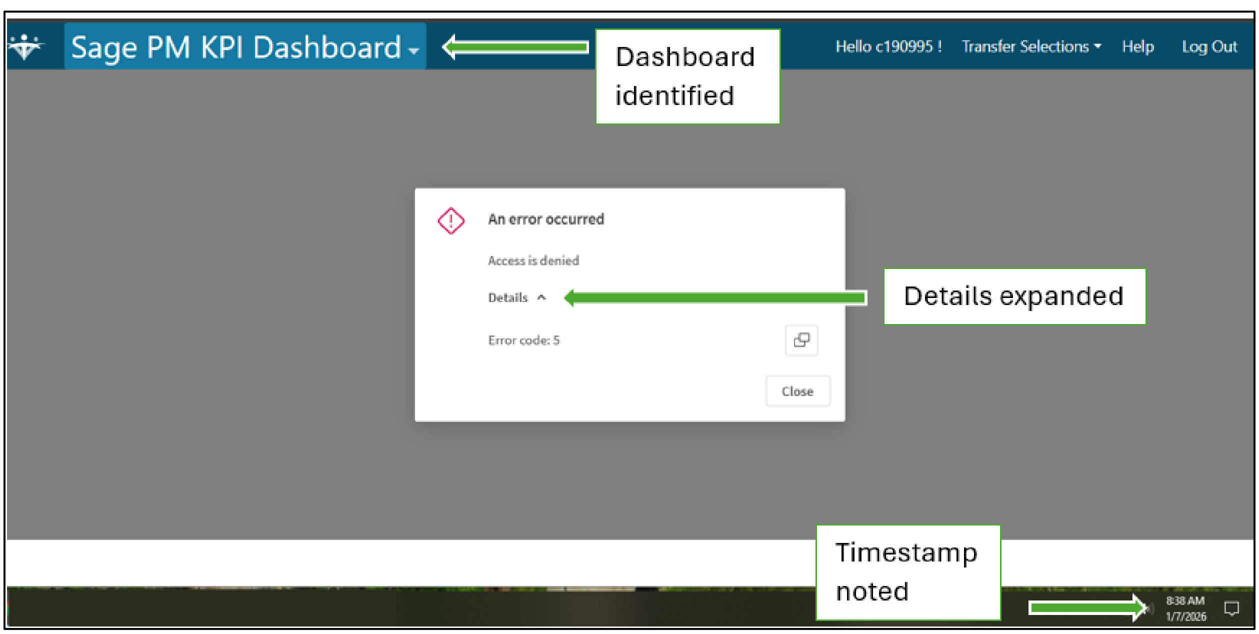
It is preferred a ticket is opened through the ServiceNow Portal, as this will allow the uploading of attachments which are critical for KPI investigations. When taking snips of a dashboard or a specific element, please include the time the dashboard last loaded and a timestamp of when the snip was taken. Below is an example of an access error and what should be included in the ticket

Dashboards Overview

This section will review how KPI Dashboards is organized and general navigation of sheets.

KPI Data Structure

KPI is divided into two Dashboards, Sage PM KPI Dashboard and Sage MSO KPI Dashboard. This reflects the two sides of Sage, Practice Management (PM) and Managed Care Organization (MSO). KPI pulls data directly from Sage-PCNX regardless of how the information was submitted.

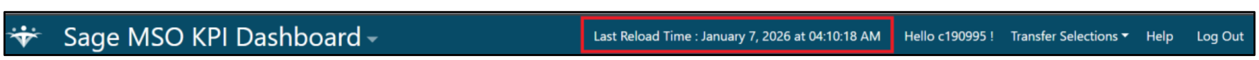


MSO primarily contains financial transaction information between providers and SAPC, while PM primarily contains financial transaction information between SAPC and the State as well as clinical documentation forms. Though certain information may pass from MSO to PM (such as billing from providers to SAPC, which in turn is then billed to the State), there are forms and data elements within Sage that are exclusive to their environment (MSO or PM) that can only be viewed within the corresponding Dashboard. For example, service authorization requests are generated in MSO. That information does not get pushed to PM; therefore, no authorization information would be visible in the Sage PM KPI Dashboard.

The drop-down arrow next to the dashboard name lists the dashboards and users may navigate between Sage PM KPI Dashboard and Sage MSO KPI Dashboard through this feature.

Data Availability

The data within the dashboards are not in real-time. Each dashboard goes through a "reload" process overnight. Information entered in Sage-PCNX on a given day will not be available in KPI Dashboards until the following day, when KPI goes through a nightly reload. The header of the dashboard will indicate the "Last Reload Time." The times may differ in the MSO vs PM dashboards as they are processed independently.



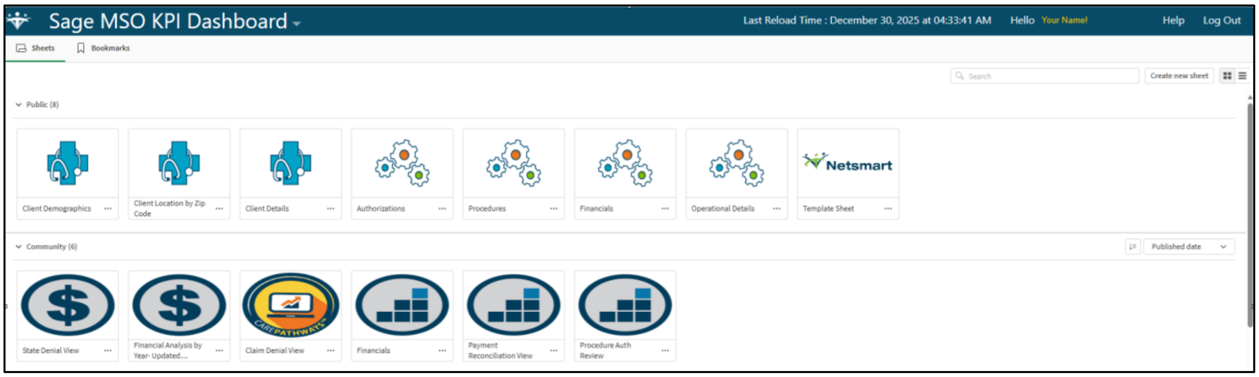
Data in the KPI Dashboards is available on a "rolling history" basis, meaning it is only available for a finite amount of time. At the beginning of the fiscal and calendar year, data is truncated to remove the oldest 6 months' worth of data. KPI maintains a history of two (2) full fiscal years, two (2) full calendar years, plus the current fiscal and calendar year.

Effective 1/2/2026 the following would be available after data is truncated on 1/1/2026:

Available Fiscal Years	Available Calendar Years
All FY 23/24	7/1/2023-12/31/2023
All FY 24/25	All CY 2024
FY 25/26 to date	All CY 2025
	CY 2026 to date

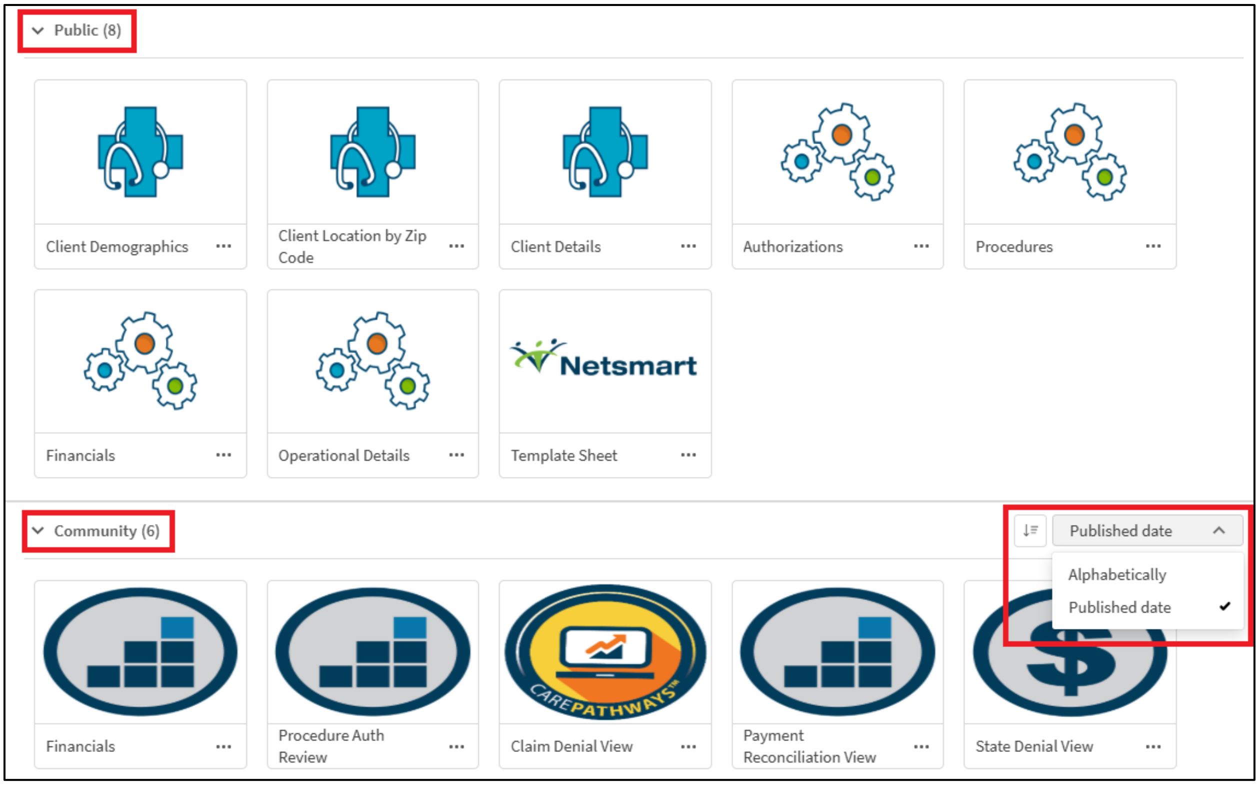
Public vs Community Sheets

When opening a dashboard, there is an App Overview as shown in the image below. It defaults to a series of “Sheets” (Views) associated with the different categories of data in the Sage-PCNX database. From this screen you will select a certain “Sheet” or “View” nearest to the type of analysis you are interested in performing. You select a Sheet by clicking on one of the icons.



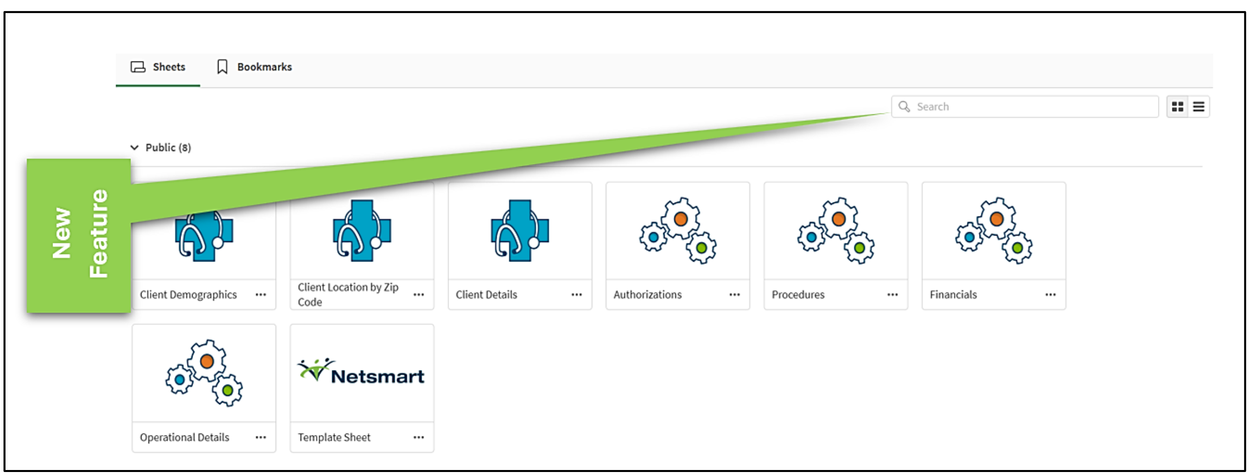
There are two sections within each dashboard, Public and Community. Public sheets are standard sheets created by Netsmart that are available to all their KPI clients. These sheets are controlled by Netsmart and are not editable by SAPC.

Community sheets were created for SAPC specifically and may be updated as needed. Community sheets may be sorted either alphabetically or by publication date with the drop-down menu on the right-hand side.



Browsing Sheets

The App Overview screen is now fully text searchable. Rather than scanning the screen or using your Web browser's find function to search amongst the many sheets, you can now use the native **Search** field in the upper, right-hand corner:



When entering keywords into the search bar, the sheet options narrow to those which contain the search criteria.

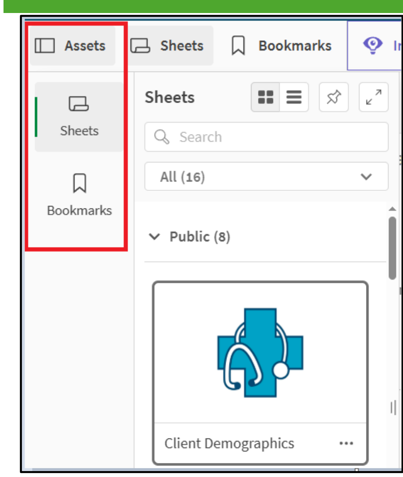
Sheet Layout

This section covers the functions and icons that are found across sheets as most sheets share layout similarities.

Toolbar

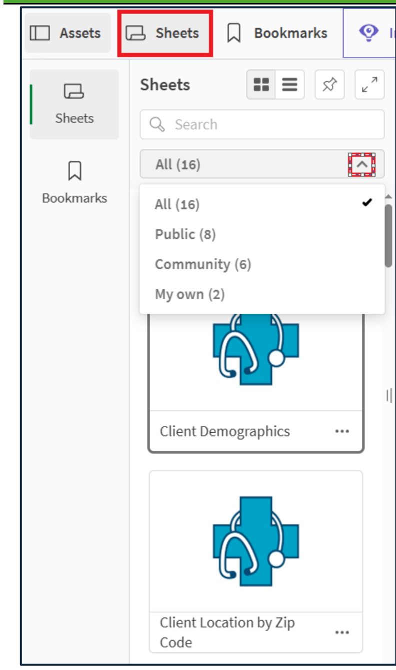
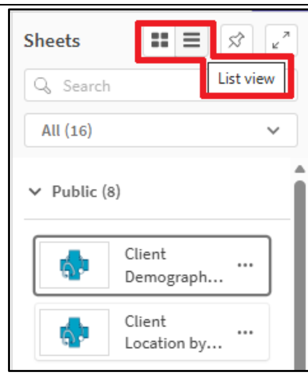
Once a sheet is selected, the toolbar (located below the dashboard header) will display icons with different functionality. Users may use these for navigation purposes as once a sheet is selected, the app overview option disappears unless the dashboard is reloaded.

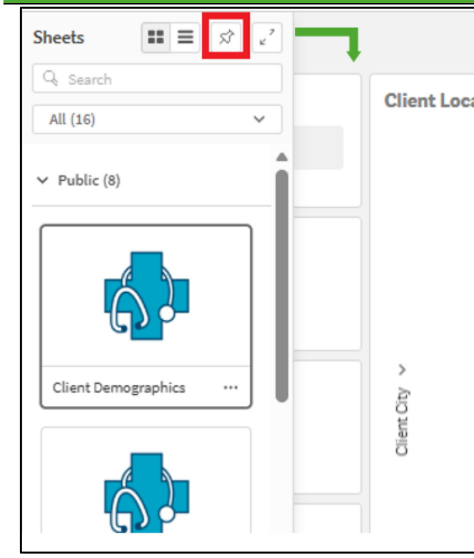
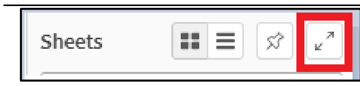
Assets

Toolbar Option	What it Does
	The “Assets” function opens a navigation pane on the left-hand side. From this view users can navigate to Sheets, which is defaulted or Bookmarks.

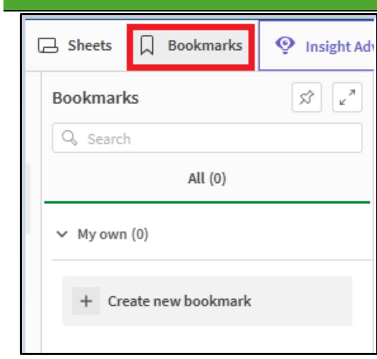
Substance Use Disorder Information System

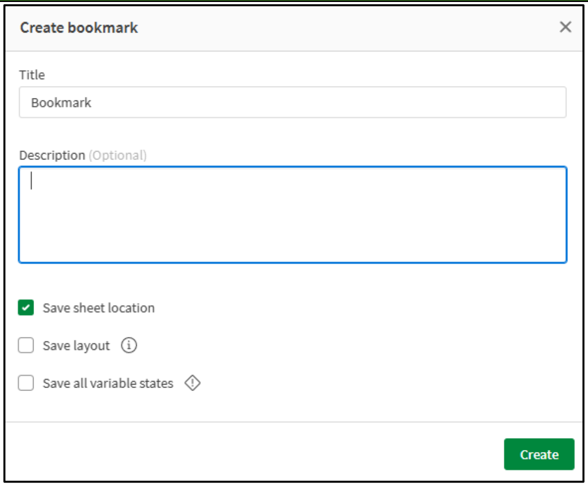
Sheets

Toolbar Option	What it Does
	The “Sheets” function shows all the available sheets vertically on the left-hand pane. By clicking on the drop-down arrow sheets can be filtered by Public or Community sheets. The search bar may also be used to find a sheet by name.
 	The Sheets panel may be viewed in either grid or list format.

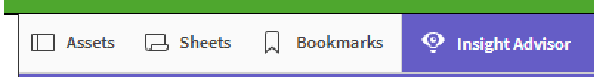
Toolbar Option	What it Does
	The Pin Assets feature under Sheets allows the selected sheet to be fully visible and not obstructed by the Sheets pane. This permits the user to always maintain the sheet grid/list visible.
	The opposing arrows will expand the view of the sheets from the left-hand pane to the full screen.

Bookmarks

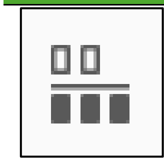
Toolbar Option	What it Does
	Bookmarks are shortcuts creating preset filters. This is useful if there are repeated metrics that are reviewed such as data by contracting program site location, by fiscal year, or by level of care. Users can create new bookmarks by clicking “Create new bookmark.” This will save any filters currently selected on the sheet. The pin and opposing arrow icons work the same as in “Sheets.”

Toolbar Option	What it Does
	When creating a bookmark, users will give it a title that will be visible when in the Bookmark pane. It is recommended a detailed description is added such as what filters were selected or the purpose of the bookmark. The default bookmark will save the filter to the specific sheet in which it was created. So, when this bookmark is selected, it will open to that sheet. “Save layout” includes the sorting and presentation of charts. Disregard “Save all variable states” as this relates to developers of sheets.

Insight Advisor

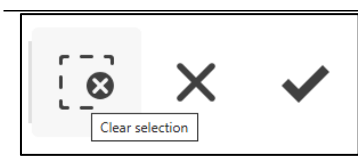
Toolbar Option	What it Does
	Insight Advisor gives users the ability to select different variables to conduct analysis and temporarily create objects. SAPC does not recommend the use of Insight Advisor for treatment providers as there are variable naming conventions that are very similar but have different functions, therefore users may not be analyzing what was intended.

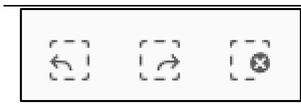
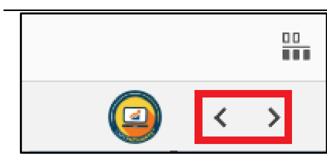
Selections

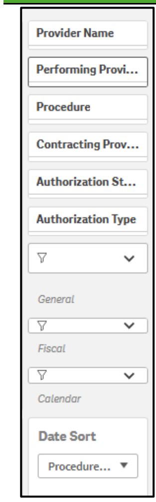
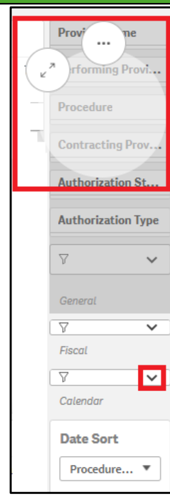
Toolbar Option	What it Does
	The Selections Tool is found on the far right of the sheet. This is a way to view all possible variables or data elements for filtering. As with the Insight Advisor, this is not recommended for treatment providers as there are variable naming conventions that are very similar but have different functions, therefore users may not be filtering what was intended.

Sheet Icons

Sheets are comprised of “objects.” Objects may be graphs, tables, a single number (KPI), or a list of filter options. Depending on the type of object, there may be various options to view or manipulate the data. However, this section will cover the icons that are visible across all objects.

Key Icon	What it Does
	Confirming Selections – when filtering data in a graph, users need to “Confirm” that selection as a data filter by clicking the Green “Check” box. This “sets” that filter as a part of the “Sheet” the user is working in. It will then appear as a Data Selection at the top of the screen. If users do NOT want to save a specific data selection which has been explored, click the Red “X.”
	Clear Selection – This icon will remove all Selections that may have been confirmed for a certain graph. It is used to remove multiple “confirmed” data filters the user may have selected.

Key Icon	What it Does
	Lock Selection – This icon will lock a specific selection that the user has confirmed. When enabled, this selection would not be removed when using the Clear Selection function.
	Data Selections – each “filter” chosen (“confirmed”) for data selections will appear at the top of the screen in the Selections Toolbar. Left-click the “X” to remove a Selection. *Note: Not clearing these selections after finishing with one data analysis project and moving to the next analysis project is the most common cause of data analysis issues.*
	There will be three icons to the left of the selected filter(s) which will aid users in navigating changes in filters. The back arrow is an undo function and undoes the last selection, such as when the wrong item was selected. The forward arrow is a redo function and redoes or puts back a filter that had been removed. This is useful when doing a comparison of a sheet with two sets of conditions. The “x” icon will clear out all currently selected filters.
	Within a sheet, users may navigate between sheets by clicking on the arrows in the upper right-hand corner.

Key Icon	What it Does
 Right click to expand or click on the downward facing arrow for more options 	"Common Selectors" can be used to find additional data that may apply to the user's analysis or to reduce the data being viewed.

Data selection Methods

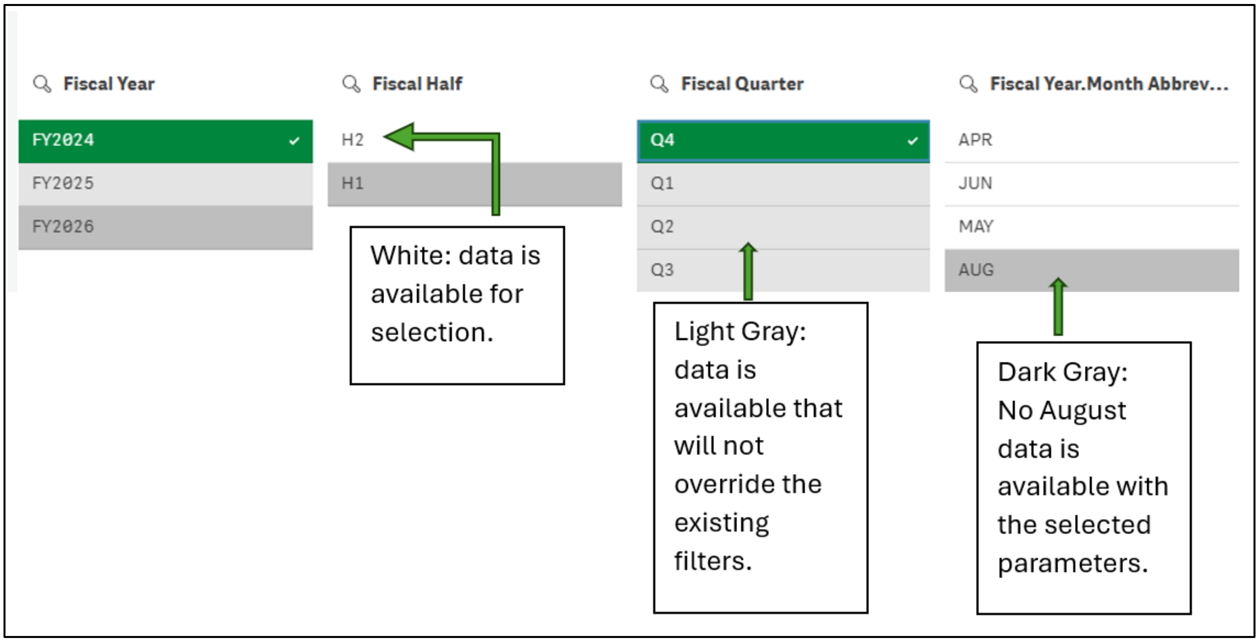
The data populated in the Dashboards must maintain strict confidentiality parameters and follows complex mapping to ensure that each user will only be able to see the information for their own agency. As such, there may be instances where all relevant data does not fully populate if it did not meet the security criteria. If users believe there is missing data, they should open a Sage Helpdesk ticket with the instructions noted above.

Sheets will default to with no filters selected. For tables, this may result in the object not populating due to "too many records." Parameters were set to limit the number of records to populate otherwise the object would time out and never load due to the volume of records in Sage. However, users may still need to filter the data more such as by data range or site location for tables to populate.

This section will cover different ways to filter data so that specific analysis or metrics may be obtained, as well as to narrow records for objects to load.

When selecting data from a filter there is a color-coding system in place to indicate if there is data with the selected filter(s).

- White: There is data available to select.
- Light Gray: There is data available that also meets the condition of the already selected filters.
- Dark Gray: There is data that does not meet the condition of the already selected filters. Clicking this will override any other filters.

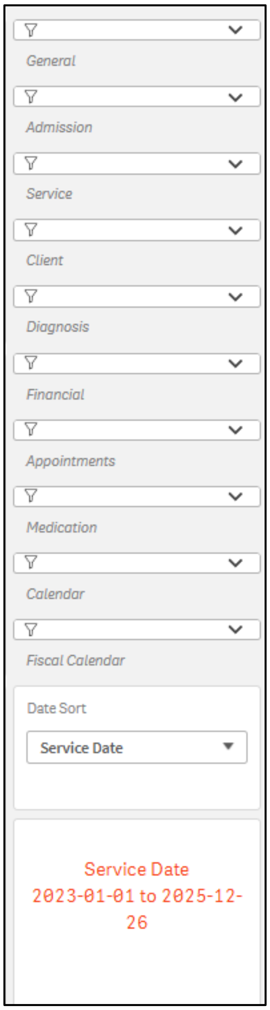


Common Selector

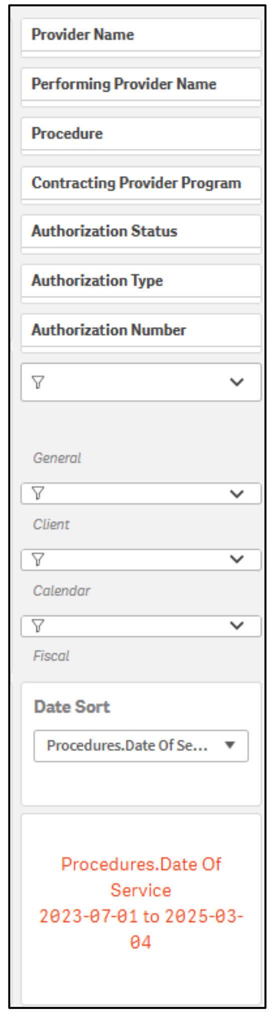
All Public sheets have the defaulted Common Selector menu on the right-hand side of the sheet. It provides common standard types of data to filter, such as provider information, and fiscal or calendar year information.

**Note, both the PM and MSO dashboards have a Common Selector menu, but their options are different as different information lives in each section of Sage.*

PM Public Sheet Common Selector



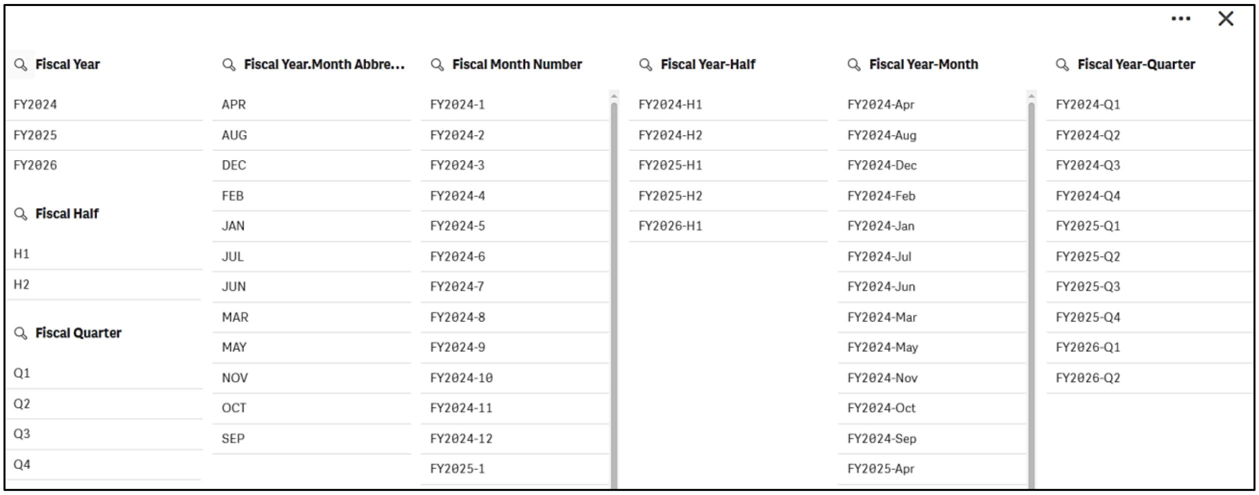
MSO Public Sheet Common Selector



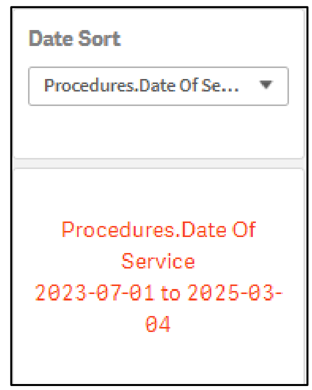
Community sheets may have a variation of a Common Selector menu with different options or may not have one at all.

When the Common Selector is right clicked or expanded, the section that was clicked will show related variables from which a selection may be made.

For example, expanding on the Fiscal year Common Selector option would display the following:



One of the most important aspects of the Common Selector is the Date Sort feature. This is defaulted to date of procedures in MSO and date of service in PM. If the sheet does not contain or is not related to billing information, then the Date Sort should be changed to a more appropriate field. This is applicable to Service Authorizations, where it may be beneficial to look at the begin date or end date of an authorization instead of authorizations with billing (Date of Service). When a change is made to the Date sort, the update will be reflected in the section below where it will update to the relevant date range.

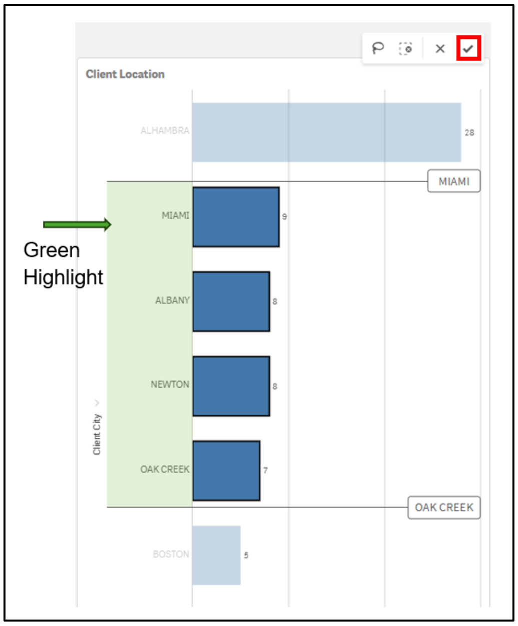


*****Important Note*****

When using the Date Sort feature, users must clear all filters prior to changing the method of sorting. Date Sorting will not be updated if filters are already selected.

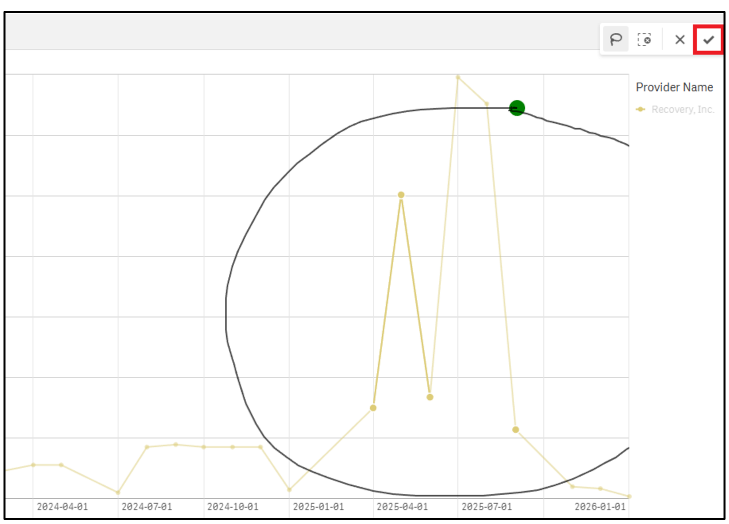
Highlight and Drag

For bar graphs, users may click and drag the mouse to highlight the contiguous values. The green highlighted items will become part of the filtered selection after the check mark is selected.

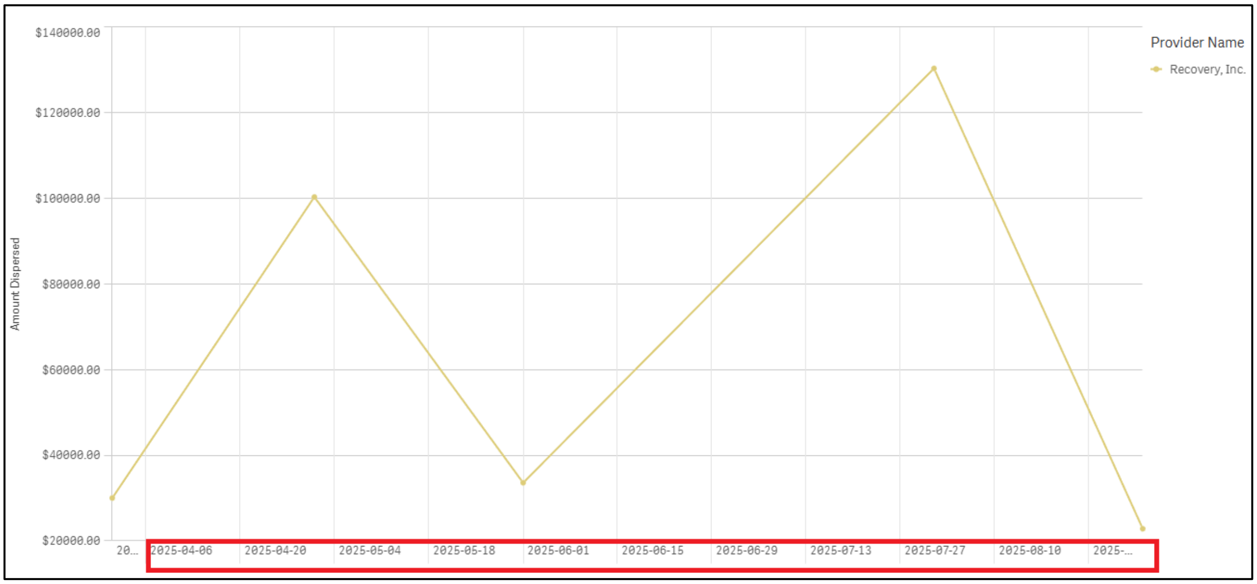


Lasso

By left clicking anywhere in a graph or line chart, a toolbar will appear in the upper right-hand corner. This allows for an additional method by which to narrow or filter selections. By clicking on the “lasso” icon users can draw a freehand circle to make a selection. The drawing does not have to be precise. Anything within the circle will update the filters.

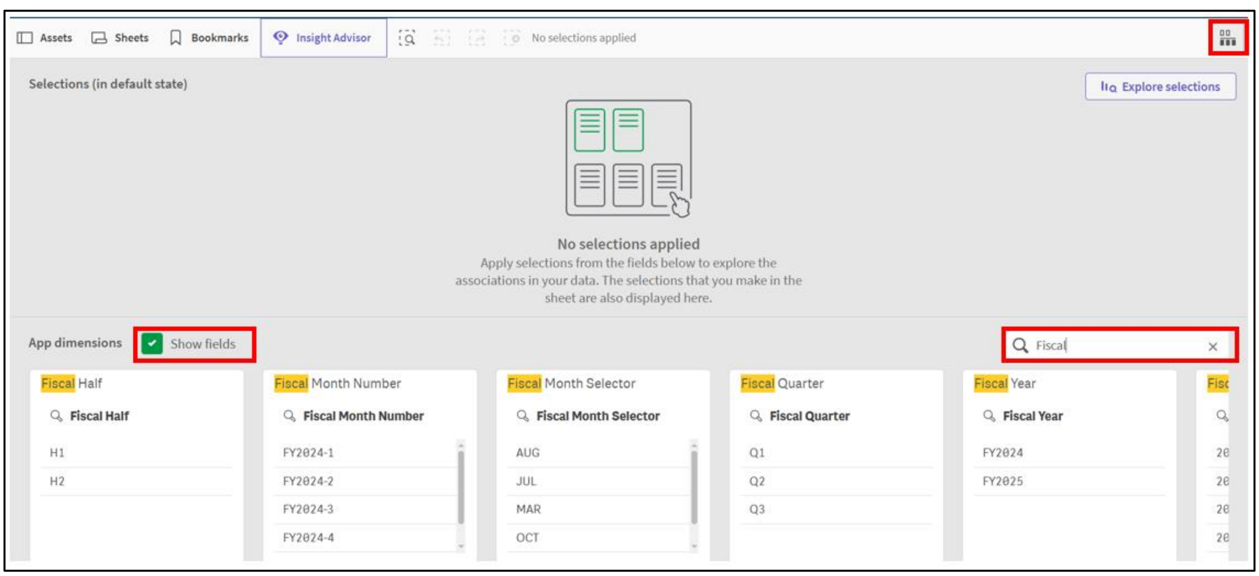


Once the check mark is selected, the line chart will update to reflect the selection. As noted in the image below, the date range is now limited to the range that was encircled.

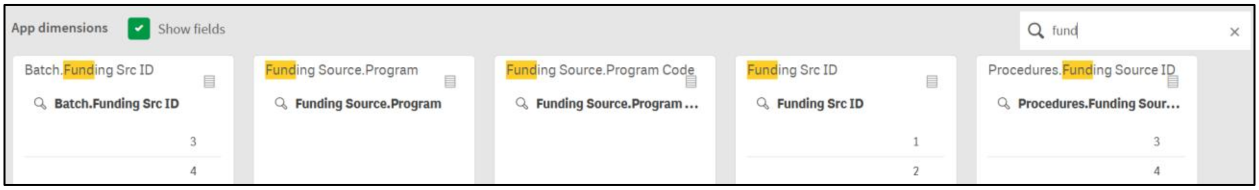


Selections

As noted in the Toolbar section, the Selections Tool gives a listing of all possible variables in KPI. It is useful when users are very familiar with the data structure, however this is not recommended for provider use as data table details are not available to providers. If used, ensure "Show fields" is checked so the variables appear below. For example, differentiating Fiscal Year is intuitive as in the snip below.



However, funding source only provides coding values which appear contradictory across similar fields. Therefore, this would not be a field providers would be encouraged to utilize.

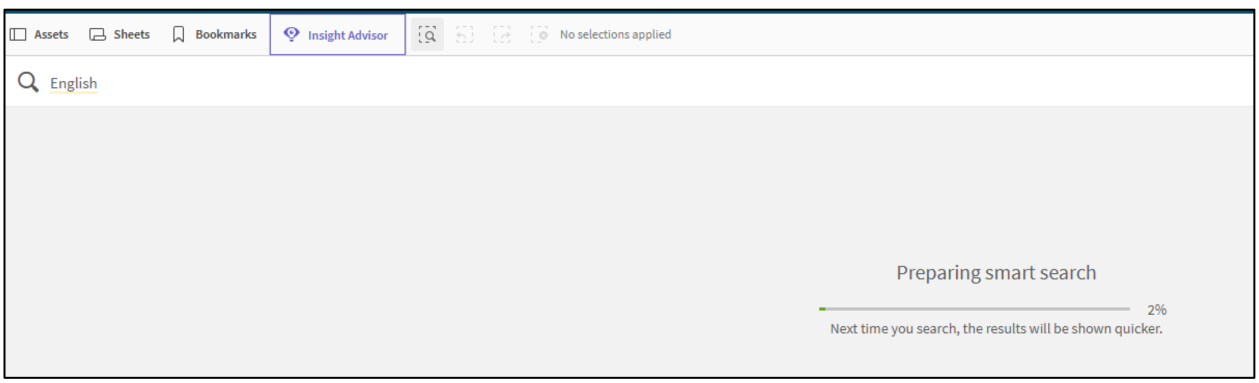


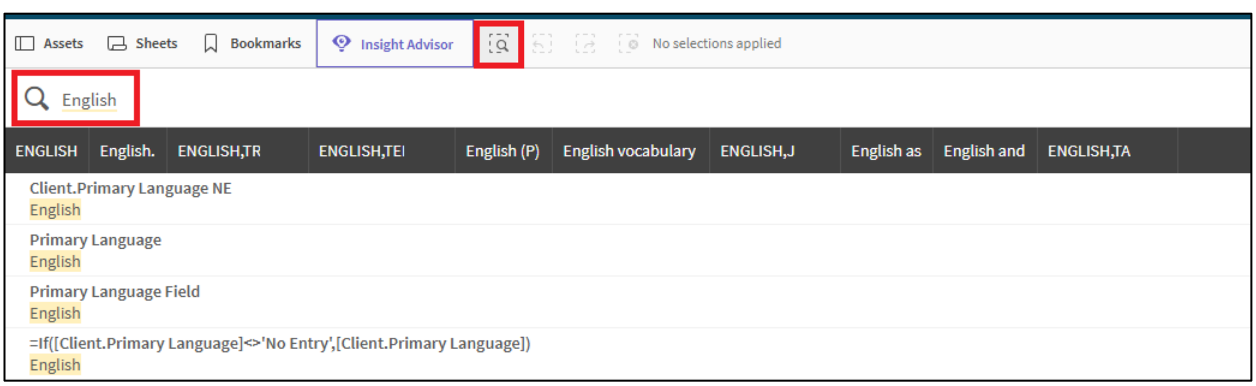
When SAPC creates sheets, the values may be manipulated to present as string text versus a code within an object. As the Selection Tool simply has a listing of variables, SAPC is not able to convert these to text within the tool.

To exit the Selections Tool, simply click on the Selections Tool icon again as there is no close or "X" button.

Smart Search

The Smart Search filters the field values and displays the matching items. This feature may not work for all users as the search may time out. Therefore, it is not a recommended search method for users. Clicking the smart search icon and entering a value you are looking for will generate a list of associated variables that contain that value.



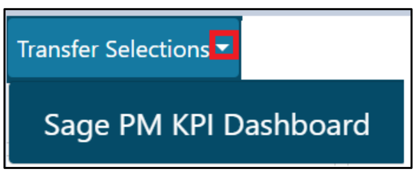


Transfer Selections

Transfer Selections is available on the header of the dashboard. This function allows the transfer of selected clients from one dashboard to another based on filters. Clients/PATIDs are the only variables that can transfer from dashboard to dashboard.

Users do not need to specifically filter by client for this feature to work. Simply, any patient that falls within the selected filters would be transferred with the Transfer Selections function. For example, if a filter for the first quarter of a fiscal year is selected, all patients with data for that period would be available to transfer.

If users are on the Sage MSO KPI Dashboard and click on the chevron icon next to Transfer Selections, the Sage PM KPI Dashboard is available for selection. When selected, the Sage PM KPI Dashboard will open to the App Overview. When a sheet is opened within this dashboard the transferred client will populate on the toolbar where selected filters are displayed.



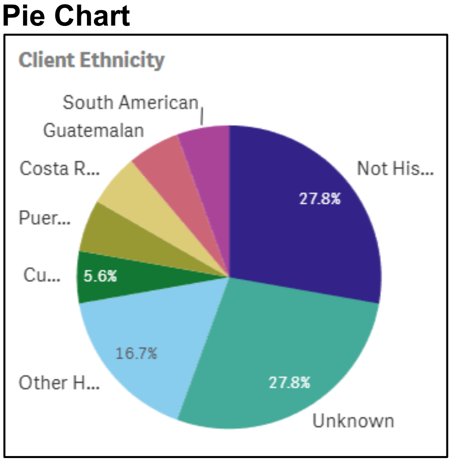
Object Details and Functions

This section focuses on the different functions of various types of objects.

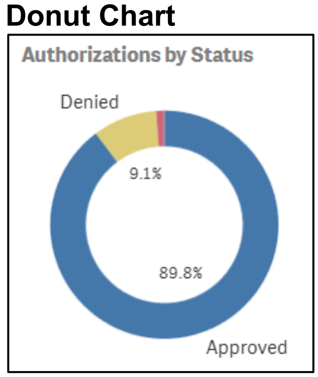
Graphs functions

Pie and donut charts function similarly in KPI.

Pie Chart



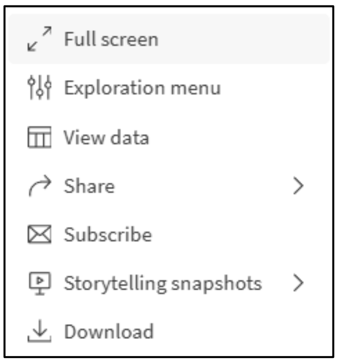
Donut Chart

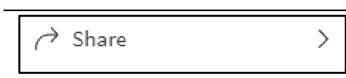
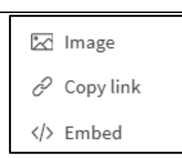


When left clicking on the pie or donut then dragging the mouse, the chart will spin. This may be a matter of preference for users to see the high percentage fields.

When hovering in the object, new icons will appear. Users will be able to download the object, expand the object to full screen, or click on the three (3) dots for additional options.

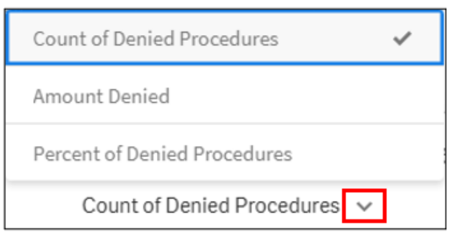
The additional options for bar and pie charts are the following:



Object Options	What it Does
	Expands the object to the full screen.
 	This option allows users to change the visualization by variable. Users may also switch pie charts to donut charts. This change will remain even after logging out. Users will be able to view counts and percentages on the chart if not already included. Users may also change the color scheme to a single color or by dimension (variable) or measure.
	This will convert graphic visualizations into table format.
 	This option is NOT configured for SAPC.

Object Options	What it Does
	This option is NOT configured for SAPC.
	Storytelling is no longer available in KPI.
 	Users may download the object as data (.xlsx) file, an image (.png), or PDF file.

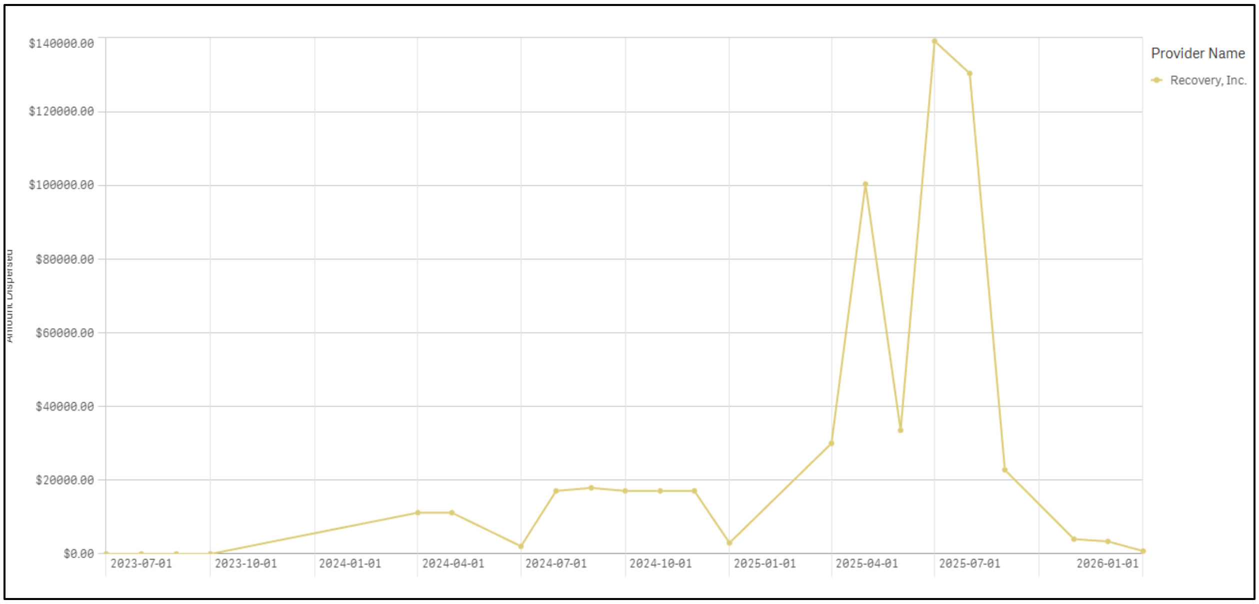
Some graphs may capture multiple types of analysis within the same object, such as providing a count, percentage, and dollar amount. When a graph or other visual representation has a chevron icon next to the variable name on either the X or Y axis, that means additional selections are available.



KPI will frame the current selection in blue and show a check mark. If another variable is selected, then the graph/chart will update with the selected figures.

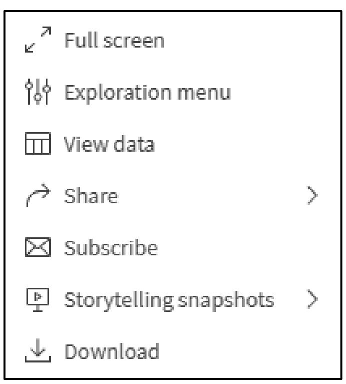
Line Charts

Line charts are a great tool for looking at trends over a period or other measure.



Hovering over the object without clicking will display a different toolbar to allow for the download, expansion and additional options.

The additional options from the three dots are the same as the bar graph, however the Exploration menu has functions specific to line charts.



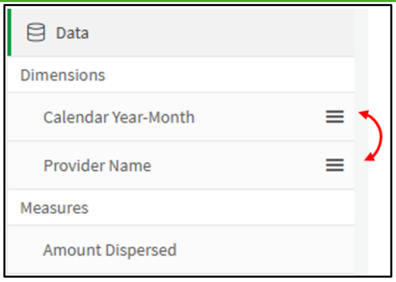
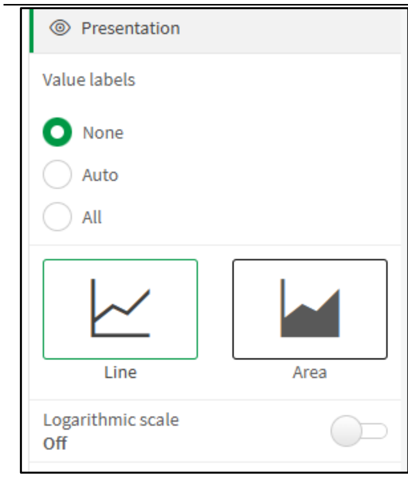
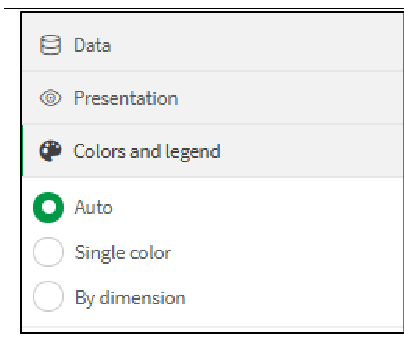
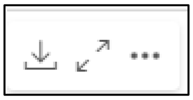
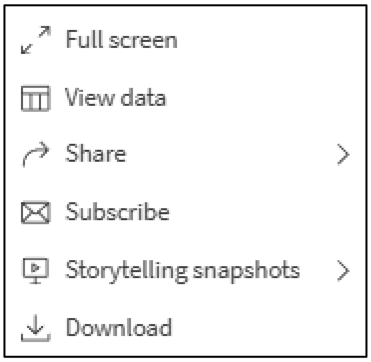
Exploration menu	What it Does
	The Data option allows each user to re-sort the variables on either axis if more than one variable per axis is available. Like pie and bar graphs which can be swapped, the formatting of the line chart may also be customized. Re-sorting will change how the data is displayed and pulled. For instance, moving Provider Name to the first position will re-sort the graph to pull Provider Name first then Calendar Year-Month.
	The Presentation option allows for the format of seeing just the line or filling in the area under the line. If there is a significant spread in data then turning on Logarithmic scale may help view the data.
	The Colors and legend option allows for the customization of the colors used on the chart.

Table functions

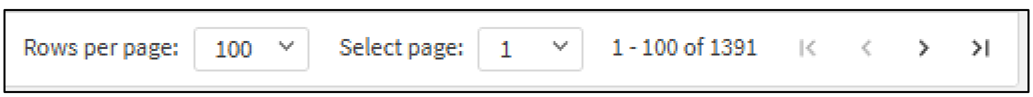
Tables in KPI dashboard generally provide detailed information regarding variables. They can serve as a data output of what was entered/submitted in Sage as well as provide aggregate counts, or a combination of both. Tables are commonly exported to Excel for additional analysis and manipulation.

As with other objects, hovering will display the download, expansion, and additional options icons.

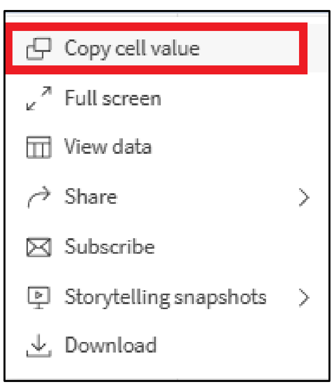




The three dots offer slightly different options than graphs or line charts. There is no Exploration menu, however the format of the table can vary if “View data” is selected. The default view of tables is an object where scrolling is often needed when there is a large data set. “View data” changes the format of the object so that instead of scrolling up and down, it becomes formatted as pages that can be navigated back and forth, similar to a report in Sage.



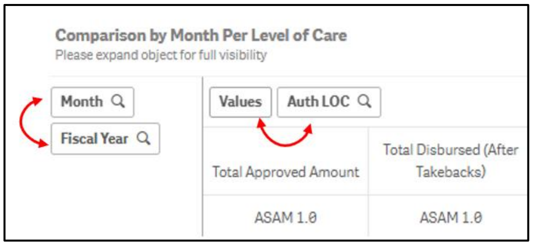
An additional feature within tables is the ability to copy information from a cell. Simply right click on the desired cell and select copy cell value from the options pop-up.



Pivot Tables

Pivot tables allow for additional filtering within the object without needing to use the Common Selector pane or filters that were added at the top of the sheet. The variables making up the pivot table are searchable themselves.

Like the other objects, the order of the variables may also be customized with pivot tables. Users may swap the order and this will change the view of the pivot table. Users are advised to use this feature with discretion as SAPC created layouts for specific purposes and it may delay troubleshooting if a discrepancy is reported by a provider with customized objects.



Downloading

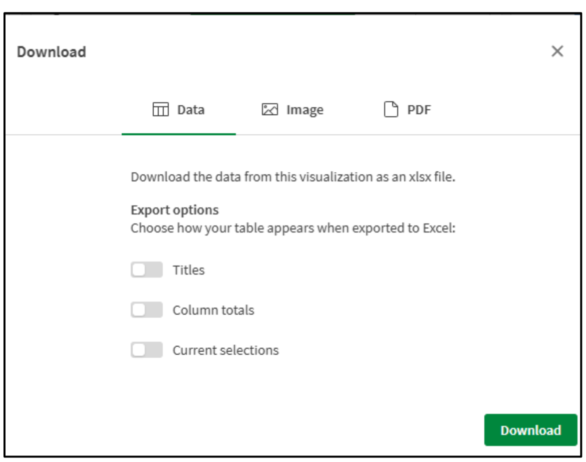
Objects may be downloaded or exported from KPI in different formats. Depending on the type of data selected some formats may be more functional than others.

Objects may be exported as “Data” which will produce a spreadsheet, an Image, or a PDF.

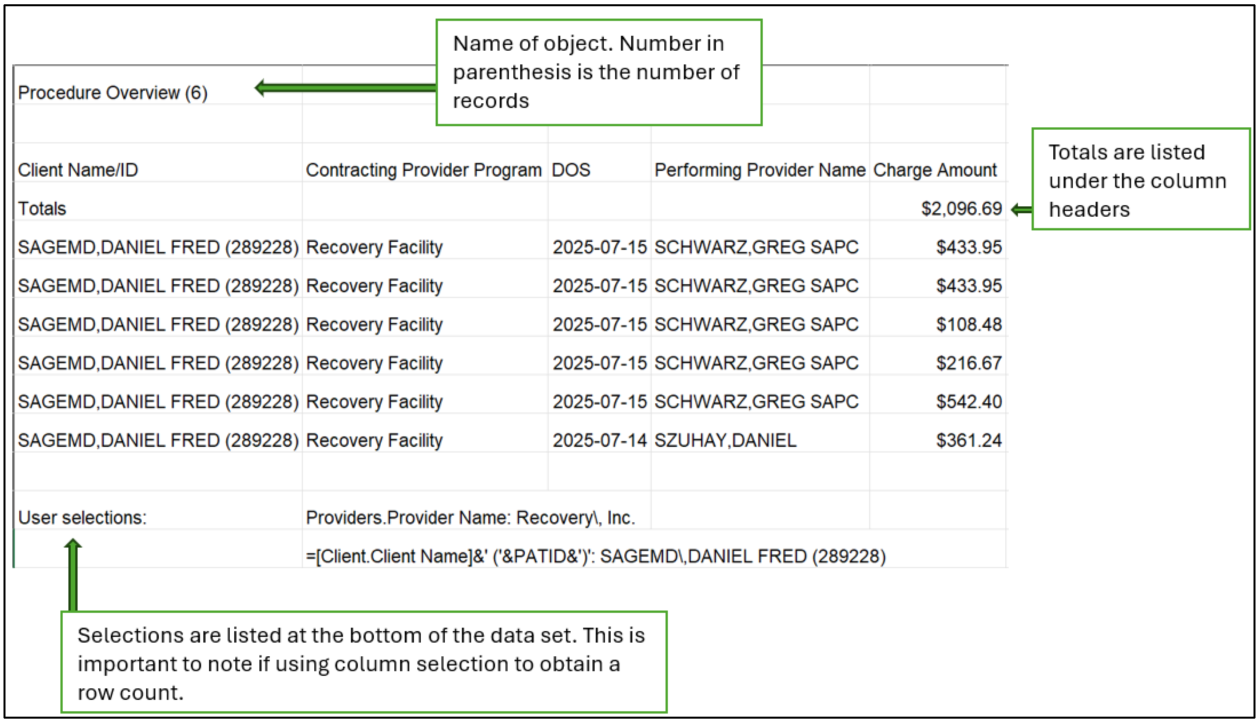
Data Type

Data type downloads are most appropriate for data that may require additional analysis. Generally, if it is in a table format within KPI, it should be exported as Data. These exports will download and save as an xlsx file.

Tables from the Legacy KPI dashboards will be converted to an updated table format, which will allow additional downloading options. The default will have no additional options selected.



The image below highlights where the “Export options” would populate on the download excel file if selected.



Procedure Overview (6)				
Client Name/ID	Contracting Provider Program	DOS	Performing Provider Name	Charge Amount
Totals				$2,096.69
SAGEMD,DANIEL FRED (289228)	Recovery Facility	2025-07-15	SCHWARZ,GREG SAPC	$433.95
SAGEMD,DANIEL FRED (289228)	Recovery Facility	2025-07-15	SCHWARZ,GREG SAPC	$433.95
SAGEMD,DANIEL FRED (289228)	Recovery Facility	2025-07-15	SCHWARZ,GREG SAPC	$108.48
SAGEMD,DANIEL FRED (289228)	Recovery Facility	2025-07-15	SCHWARZ,GREG SAPC	$216.67
SAGEMD,DANIEL FRED (289228)	Recovery Facility	2025-07-15	SCHWARZ,GREG SAPC	$542.40
SAGEMD,DANIEL FRED (289228)	Recovery Facility	2025-07-14	SZUHAY,DANIEL	$361.24
User selections:	Providers.Provider Name: Recovery\, Inc.			
	=[Client.Client Name]&' ('&PATID&')': SAGEMD\,DANIEL FRED (289228)			

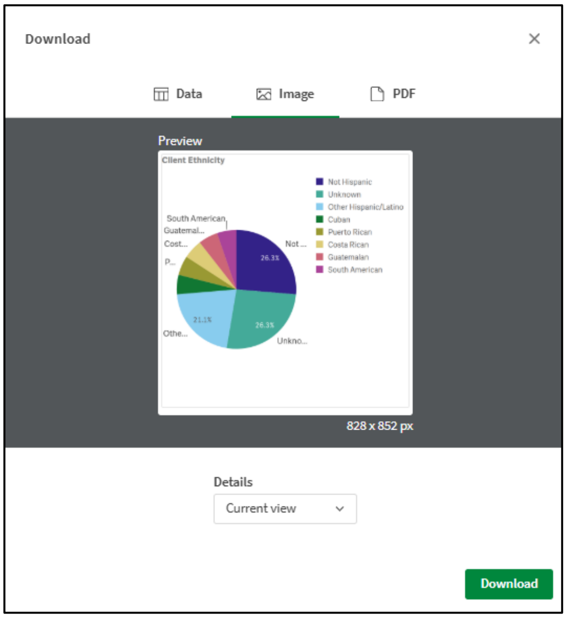
If the additional rows added by the “Export options” interfere with additional analysis users need to conduct, they can manually be moved to a different location on the spreadsheet. Otherwise, it is recommended they are not included in the export

Image Type

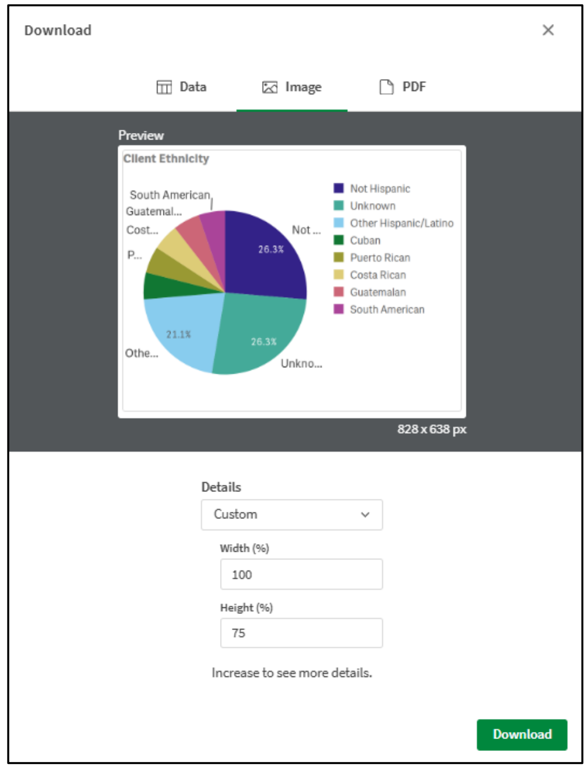
Image type downloads save as .png files. Users will be given then option to download the object as is in the “Current view” or to customize the width and height of the image.

Substance Use Disorder Information System

Current View

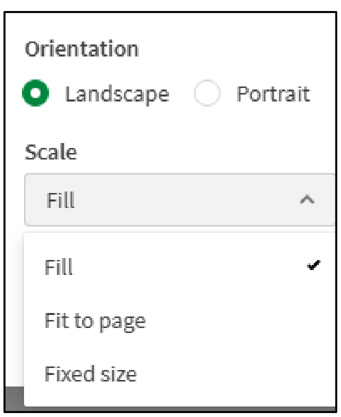


Custom

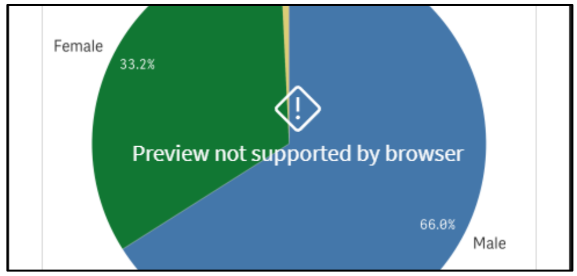


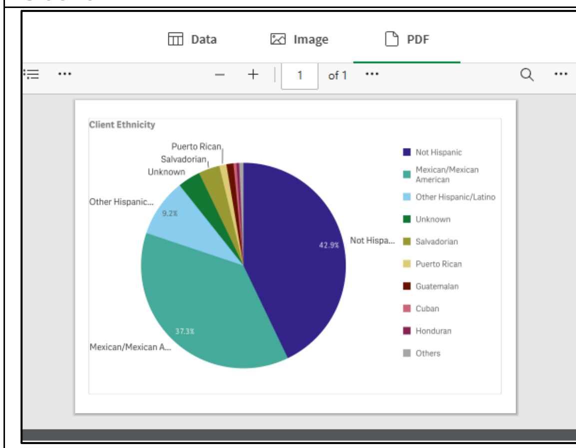
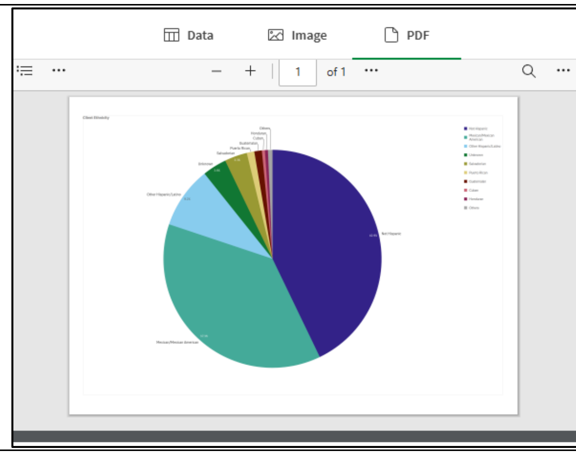
PDF Type

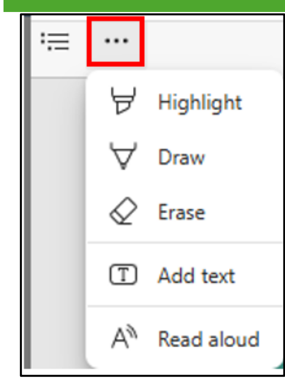
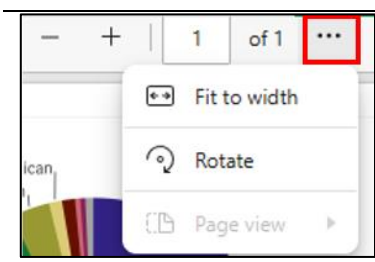
PDF downloads allow for exporting in either Landscape or Portrait mode. Users also have the option of choosing the scale size to Fill, Fit to page, or Fixed size. PDF downloads are different than image downloads in that PDF allows for manipulation to the image prior to exporting.

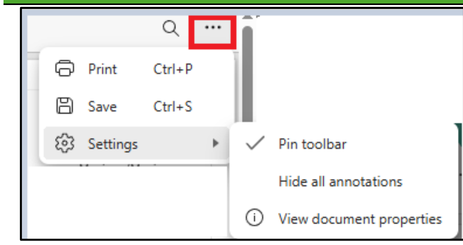


**Note: Users may experience seeing a “Preview not supported by Browser” message if the browser version is out of date, but the download feature will still work.*



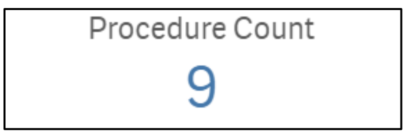
Scale: Fill	Scale: Fixed size
	

Download Features	What it Does
	The three dots on the left side of the PDF download screen allows for editing to the image prior to downloading.
	The three dots in the middle of the PDF download screen allows users to change the view within the download window prior to downloading.

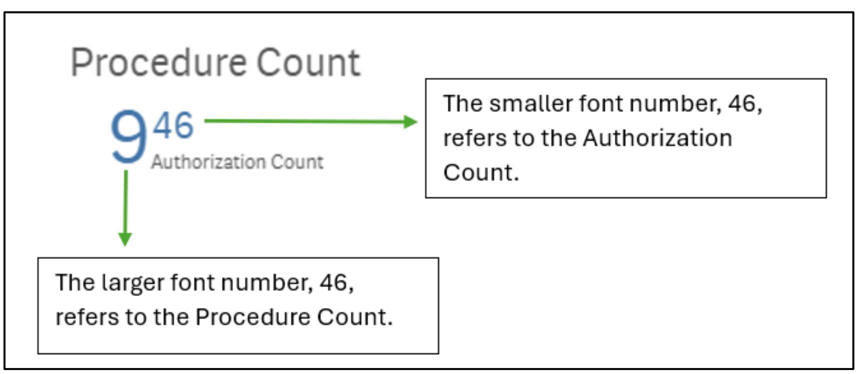
Download Features	What it Does
	The three dots on the right side of the PDF download screen provide options for saving and/printing.

KPIs

There are two types of KPI objects within the dashboard, single KPIs and multiple KPIs. Single KPIs are easy to identify as they simply display a figure, usually a count, of a variable. The description at the top defines what the single KPI is displayed.



Multiple KPI objects are single objects that show 2+ KPIs. These are less common as having more than one KPI may cramp the object.



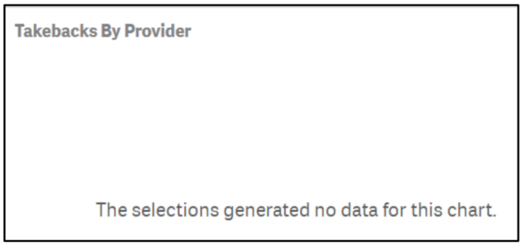
Blank Objects

There are occasions where objects may present with no information, an error message, or other special messaging. Objects may not populate for a few reasons.

1. The object pulls data from forms SAPC does not use
    a. This applies most to the Sage PM KPI Dashboard where several Public sheets are blank because SAPC does not use the standard Netsmart

product forms linked to the sheet, such as labs or treatment plans; SAPC customized forms to document similar information.

2. There is no data based on the selected filters.
    a. A common example is in the State Denial View. State billing is behind local billing to SAPC. If a user selected a date range from the previous week only, it is unlikely it would have been billed and processed by the State, therefore there would be no data that met those filters. Users may see a message in the object like the image below.



3. Sage PM KPI Dashboards has financial information.
    a. As PM holds financial transactions between SAPC and the State, objects containing dollar amounts are blocked for providers. This result in an “incomplete visualization” message for visualization objects such as graphs or charts. If a table contains dollar information, it will show up as $0 dollars for contracted providers, however SAPC staff will have visibility on the accurate dollar amount.