Sage-PCNX Guide to Widgets

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Introduction

Sage-PCNX integrates a more dynamic user interface experience with increased access to pertinent data. SAPC has configured Sage-PCNX with various widgets that are designed to improve workflows depending on the user role assigned. A Widget is a component within an application that provides specific piece(s) of information or data on demand from other areas of the application.

Widgets are used exclusively in Sage-PCNX to quickly show related data, primarily in table formats, within the application from different Views. The purpose of this Widget Job Aid it to describe all the widgets that are available within Sage-PCNX and detail their functionality (e.g., intended use) to help providers efficiently access form data within the application to improve work productivity. The widgets are not reports, but rather ways to quickly review information without the need to open the forms or documents within the system, particularly for improving workflow and compliance visibility. Most widgets also include hyperlinks to the form from which the information the widget is displaying.

Some widgets may take longer to load given the data they are pulling and may require reloading the widget to populate data. Most widgets can be undocked (pop out) and viewed on another screen while still working within PCNX.

The upper right-hand corner in the widget will indicate the functionality the widget has regarding refreshing and undocking (pop out functionality). The icon on the right indicates the widget can be undocked (popped out) so the content can be viewed in full screen mode. The second icon indicates that the widget can be refreshed.

Tip: *If information was recently entered and it is not visible on the widget, please click refresh.*
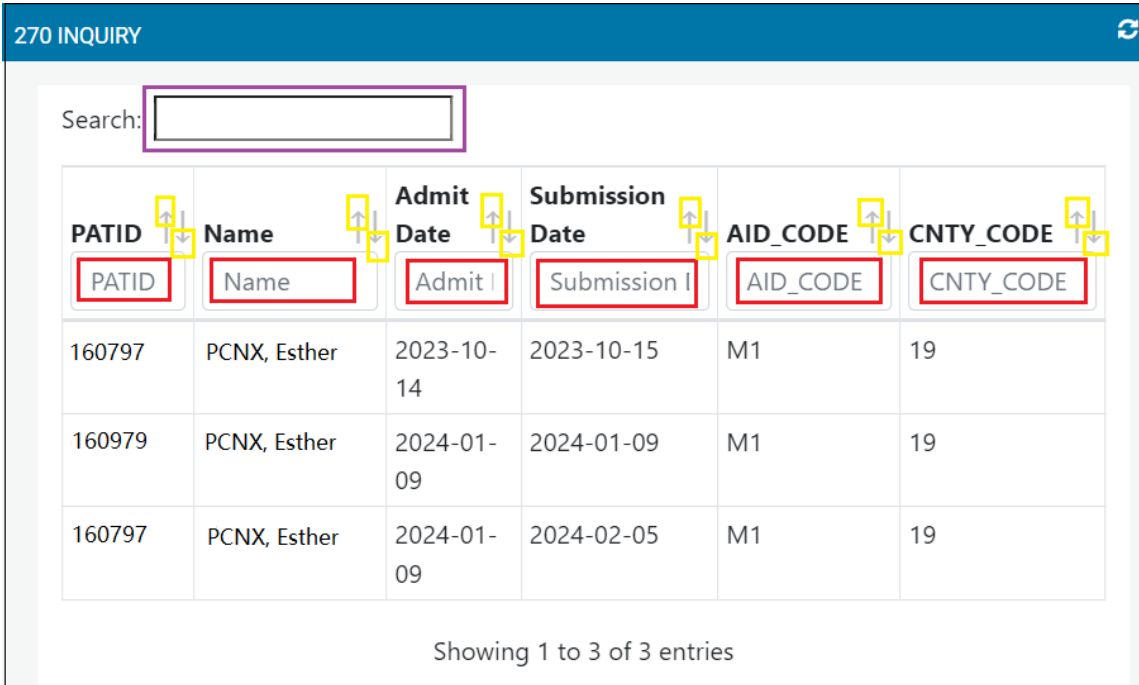
Enhanced Widget Functionality

There are standard and enhanced widgets. The enhanced widgets have additional functionality including sort, search and filter options for available data and Read Only viewing thru the Console Widget Viewer. There are 2 different filtering methods, both described below. Examples of these enhanced widgets are below and detailed throughout the Widget Job Aid.

Sort, Search and Filter

Sort, Search and Filter

Some widgets are sortable, searchable and allow the user to quickly find a specific row of data (filter). Examples of these functionalities are illustrated below in the 270 Inquiry widget.

In the above example, each field is sortable in ascending and descending order. To sort, click either right above or right below the arrow next to the field by which the user would like to sort the data, as highlighted by the yellow boxes above. Additionally, the user can quickly find a specific row of information (filter) by typing the requested information in any of the boxes highlighted in red above.

Finally, the search bar, highlighted in purple above, searches data that has already been populated to the widget.

NOTE: The search bar in a widget is not connected to the normal search function, but only searches for data in the widget.

Tip: *All column widths in the widgets that have the sort/search/filter functionality are adjustable. Simply hover the mouse between the two columns until the expand/shrink column image appears* ⊣⊢. *NOTE: Columns will re-set once you the user leaves the View or logs out of* Sage-PCNX.
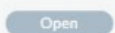
Sort Only

Other widgets only have a sort functionality and the arrows in the widget look different but have the same storability function as described above.

For example, to sort any of the sortable fields in the Progress Note widget example below, click on either the up or down arrow, as highlighted in yellow.

NOTE: The size of the columns in the widgets with this functionality can not be adjusted.

Filter Drop Down

The filter drop down function allows the user to show only specific forms.

For example, click on "ALL" in the column for which the user would like filtered forms, as highlighted in yellow below. Chose the filter(s), then click on the "X" highlighted in red below. The user can choose more than one item to filter and/or more than on column to filter. To clear all filters, click "Clear Filters" highlighted in green below.

Console Widget Viewer

The Console Widget Viewer allows the user to access a Read Only version of data found in a specific record from the widget without the need to open the form or document.

For example, to review a Read Only version of a Progress Note, the user can do so in the Console Widget Viewer by clicking the "View" button highlighted in red under the Action column below.

A Read Only version of the Progress Note will then appear in the Console Widget Viewer on the right of the Progress Note widget, as illustrated below. Note the boxes highlighted in yellow above and below, indicating which progress note is being displayed in Read Only mode in the Console Widget Viewer. The form can be closed by clicking on the "X" in form name highlighted in purple below.
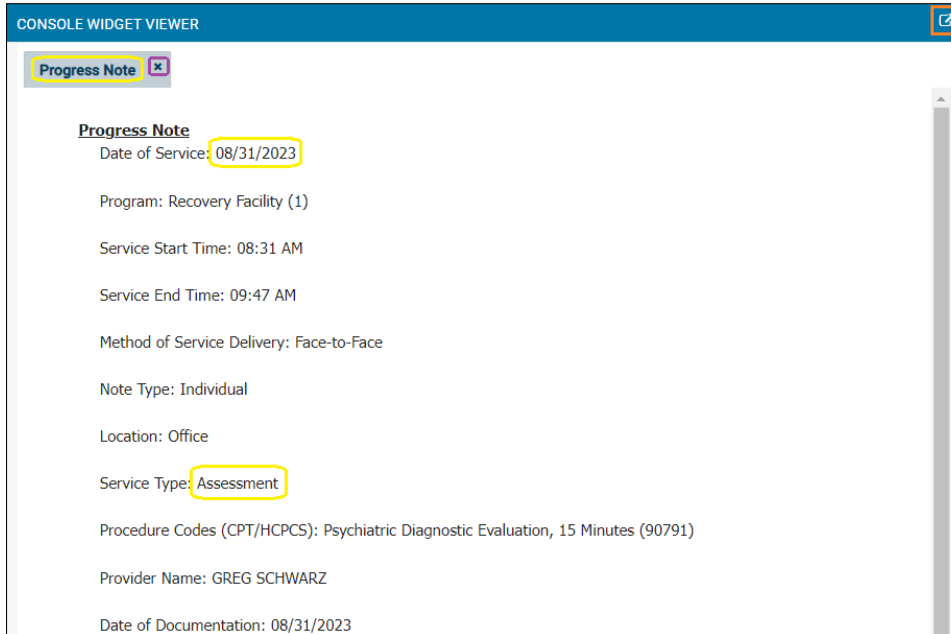
The Console Widget Viewer can be undocked or popped out by clicking on the arrow icon in the upper upper-right corner, highlighted in orange above. Once the Console Widget Viewer is popped out, the selected document is cleared and must be selected again on the original widget it was selected. The user will receive a message on the Console Widget Viewer stating, "Only new documents will be displayed in this console viewer," which indicates the document must be re-selected to display.

Multiple forms can be viewed in the Console Widget Viewer. To do so, the user would select forms for viewing and then a new tab is opened for each form in the Console Widget Viewer.

The example below has three (3) open forms viewable in the widget.

Individual forms can be closed by clicking on the "X" in form name highlighted in purple below, or all the open forms can be closed by clicking on "Close All," highlighted in red below.

In addition, the form displayed in the Console Widget Viewer can be accessed by either clicking "Open" in the All/Doc Chart widget or "Open Record" in the Console Widget Viewer, both highlighted in green below.
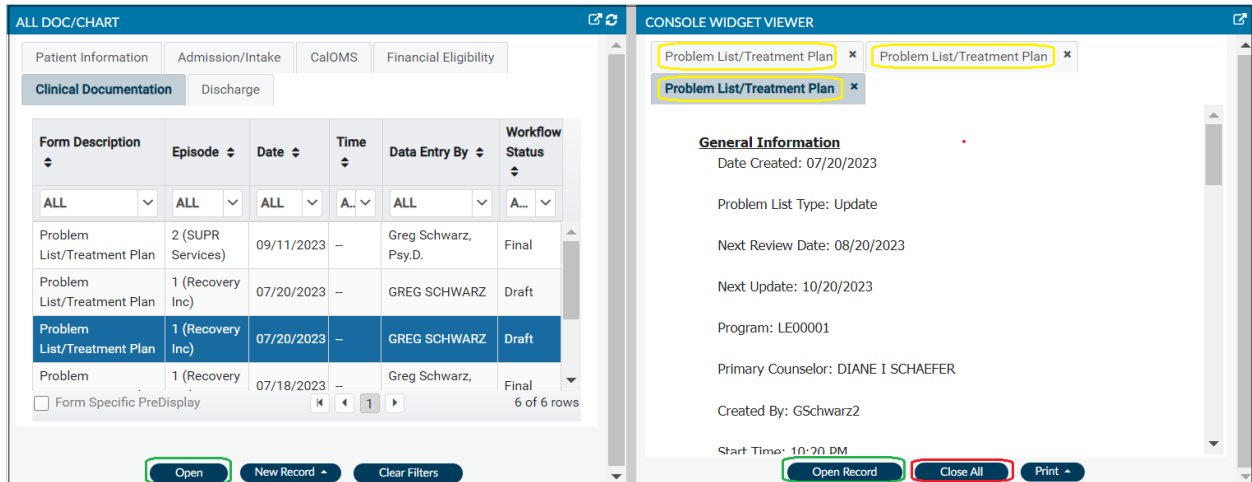
To Print one or more open records in the Console Widget Viewer, choose "Print", highlighted in red below, and 2 choices will appear, "Print Current" and "Print All," giving the user the ability to print just one record, as highlighted in yellow below, or print all of the open records in the Console Widget Viewer, highlighted in purple below.
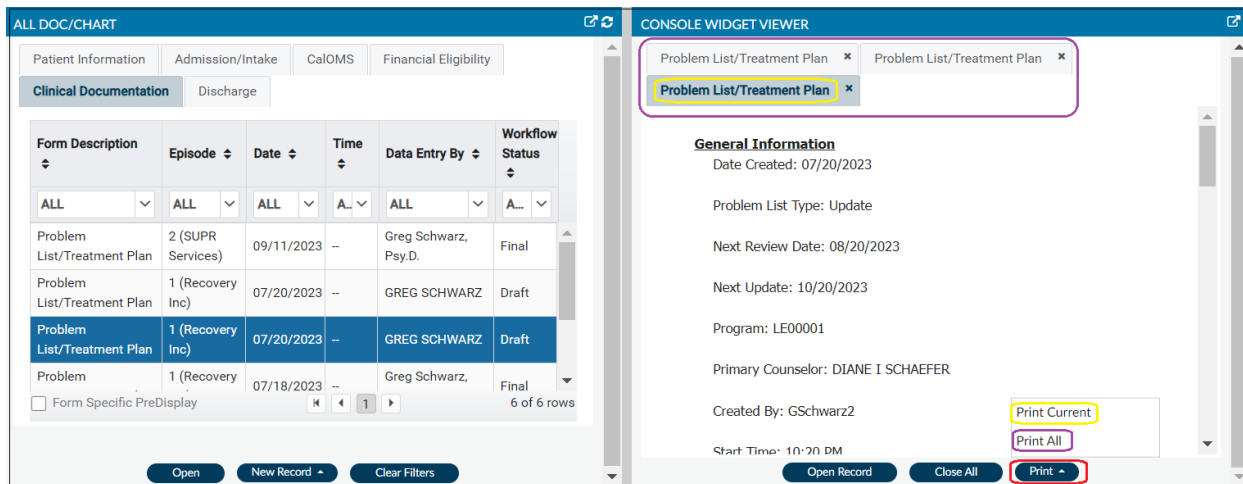
NOTE: When printing files in the Console Widget Viewer populated from the Provider File Attach widget in the Client Dashboard, only Pdf and Tiff files can be viewed and printed.

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myDay View Widgets

When PCNX is opened, the myDay view is the landing page for all users.
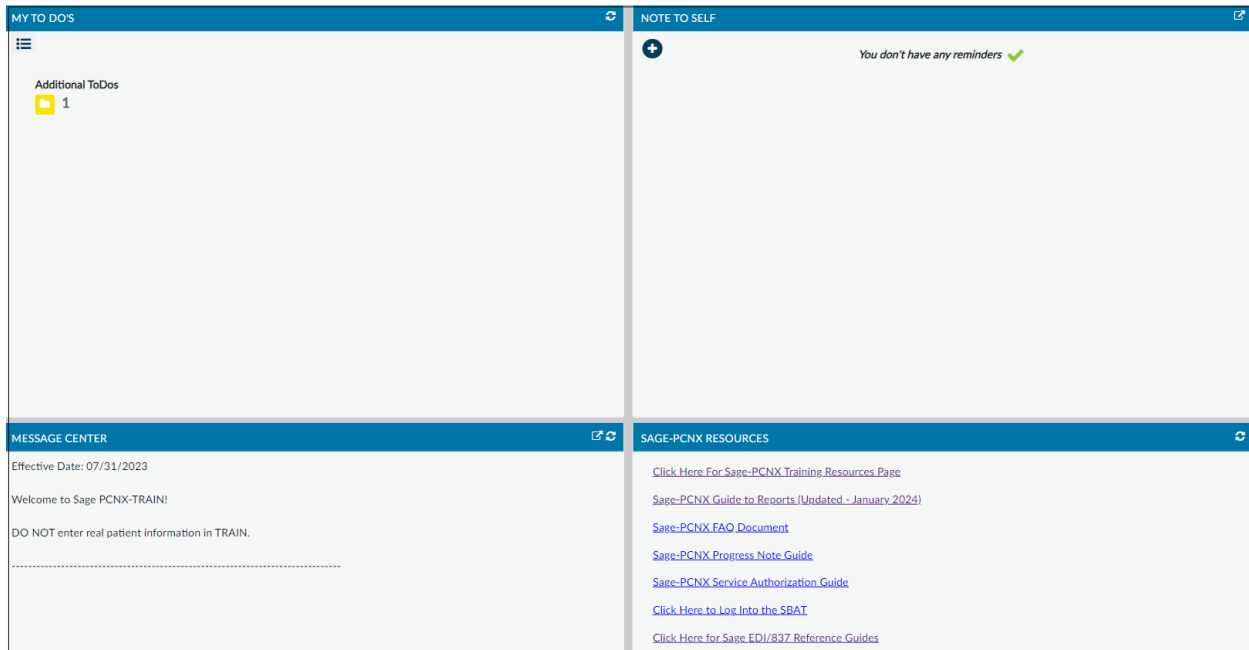
The myDay view is comprised of four (4) widgets: MY TO DO'S, NOTE TO SELF, MESSAGE CENTER, and SAGE-PCNX RESOURCES

My To Do's

The My To Do's widget allows the user to keep track of forms that are in Draft status. This widget is automatically updated each time the user saves a from in draft.

The following forms can be saved in Draft status and will be immediately added to the My To Do's widget when saved in draft: DISCHARGE AND TRANSFER FORM, DRUG TESTING, PATIENT HANDBOOK AND ORIENTATION VIDEO ACKNOWLEDGEMENT, PATIENT MEDICATIONS, PROBLEM LIST/TREATMENT PLAN, PROGRESS NOTE, RECOVERY BRIDGE HOUSING DISCHARGE, REFERRAL CONNECTIONS, SERVICE CONNECTIONS LOG, and YOUTH AND YOUNG ADULT SCREENER.

NOTE: The list of forms that populate the My To Do's widget is subject to change depending on any updates. Any form with the final to draft option, left in draft status will populate the to do list.

To see which forms have been left in Draft status, click anywhere in the widget.
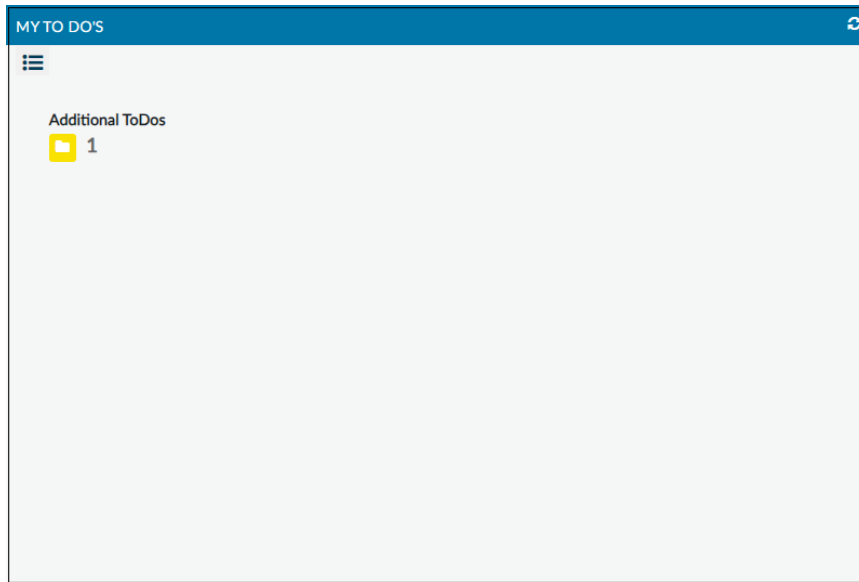
The My To Do's widget will then populate with a listing of forms in Draft status.

The forms left in Draft status can be sorted by Item Type, Days in Queue, and Client. The 3 different ways of sorting can be chosen from the drop-down menu in the top right-hand corner, highlighted in red below. To close the To Do's view, click on "Close" highlighted in yellow below.
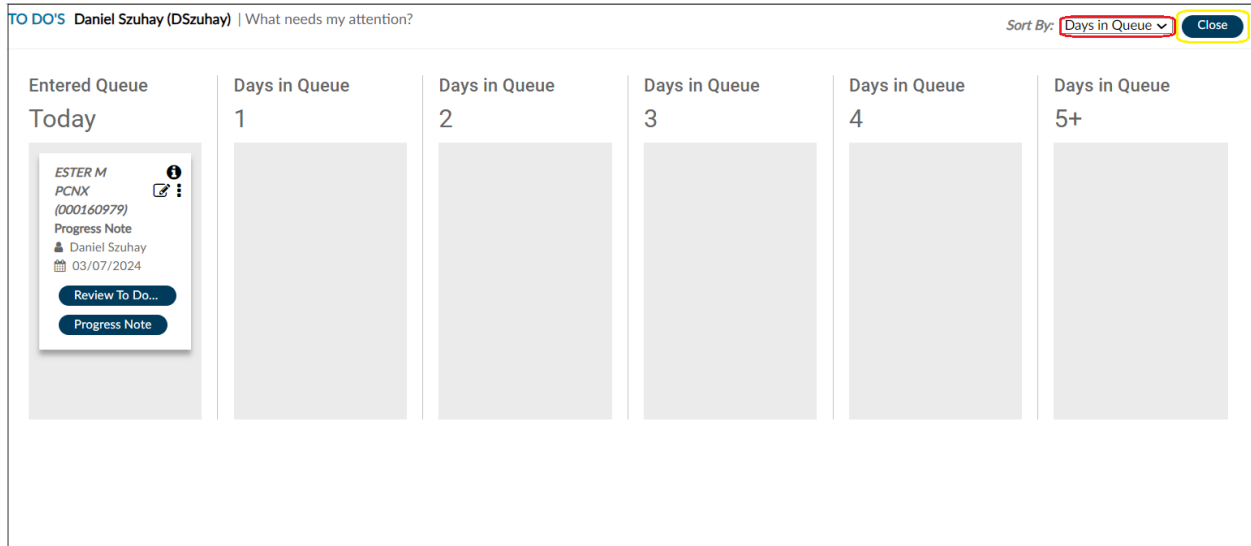
To directly access the form saved in Draft status, click on the name of the form, as highlighted in yellow.

NOTE: Do not click on "Review To Do Item" highlighted in red below. The "Review To Do Item" will display the information, however, it will not allow the form to be finalized and will remove the notification from the To Do's.
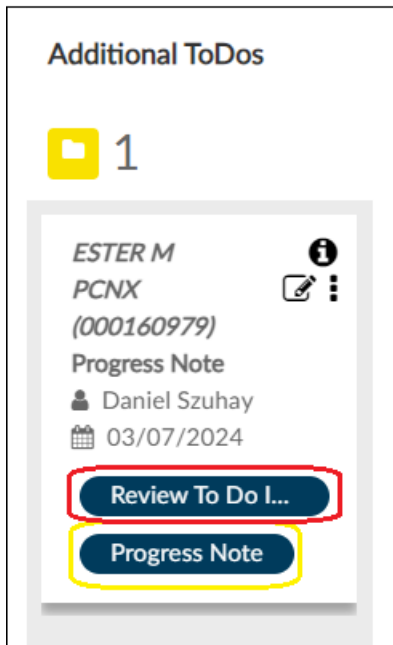
The user can create an "electronic post it note" for each "Additional ToDos" listed in the To Do's widget. A Note to Self in the To Do's (not to be confused with the Note to Self widget, described below) can be easily created by clicking on either of the icons in the upper right-hand corner of the Additional ToDo's as highlighted in yellow below. Once a Note to Self has been written, click "OK." The Note To Self will be "attached" to that Additional ToDos and can be viewed, edited, and removed.
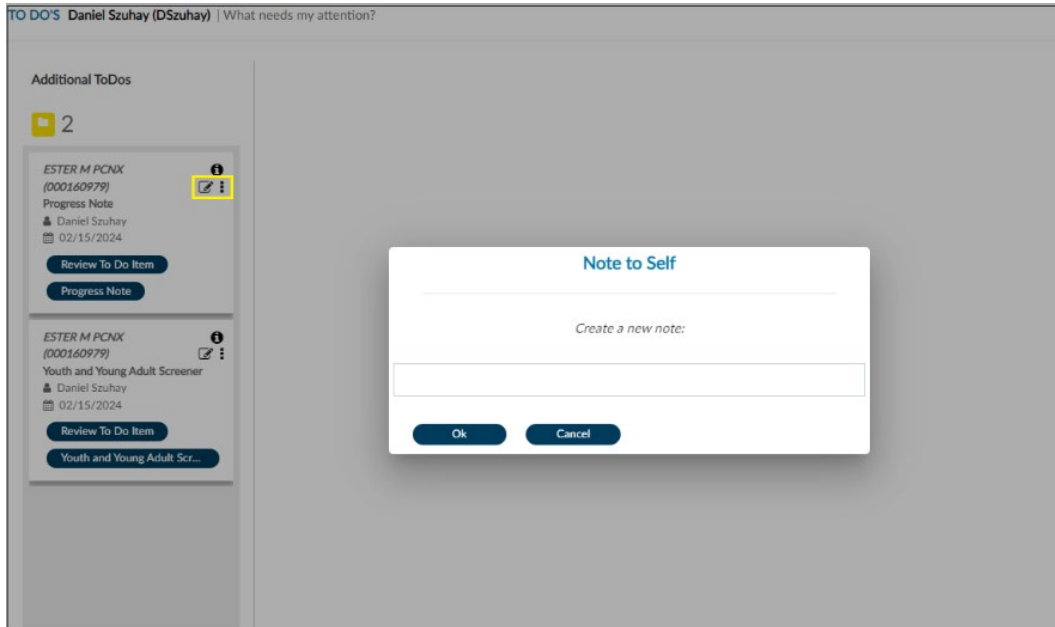
If there are any forms left in draft status after logging out of PCNX, when next logging into PCNX, the following screen pops up as a reminder.
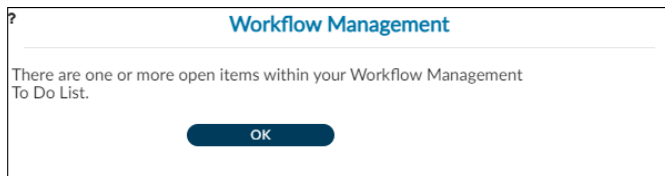
Click "OK" to enter PCNX

If there are any outstanding My To Do's, while working in PCNX, a reminder window will pop up noting that there are unfinished tasks.

These reminders are helpful to ensure clinical documents are finalized within the appropriate timeframes to improve compliance.
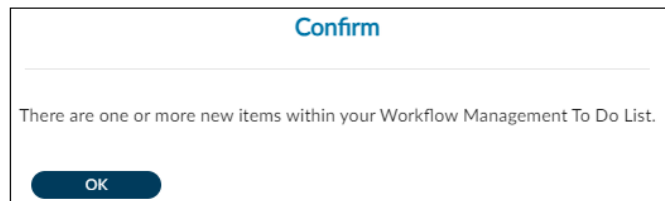
Click "OK" to close this reminder.

Note To Self

The Note To Self widget allows the logged in user to create notes and reminders for themselves. This is a manual process, and it is not generated by the submission of a form, such as a progress note or problem list. Additionally, these reminders cannot be connected to a patient's profile and are only visible to the logged in user.

Click on the "**+**" icon highlighted in red below to create a new note.
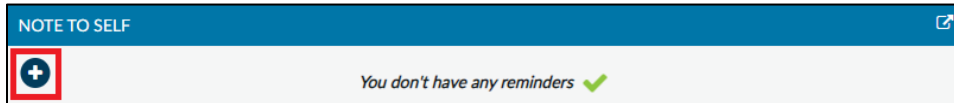
Enter the reminder(s) and click "Save."
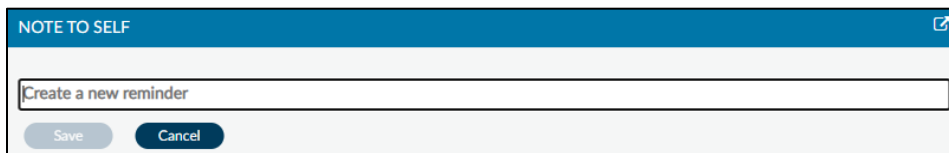
To edit or delete an item click on it so it is highlighted in blue. The **Edit** icon on the right highlighted in yellow below will allow the user to edit the test, while the **Delete** (**X**) icon highlighted in red below will delete the item from the list.
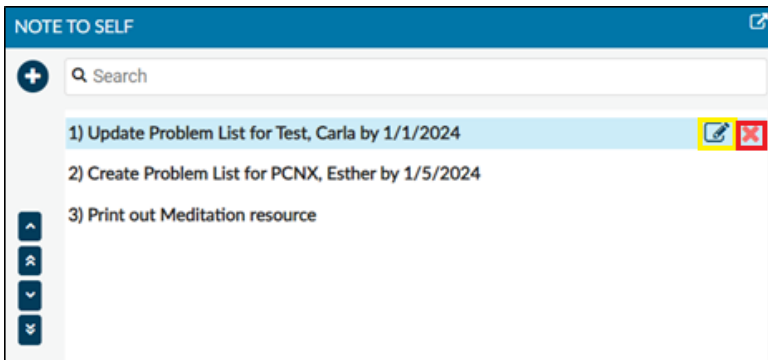
The menu items on the left allows users to reorganize the order of the notes. Click on an item so it is highlighted in blue, then click on the arrows on the left-hand side moving the items up or down the list.
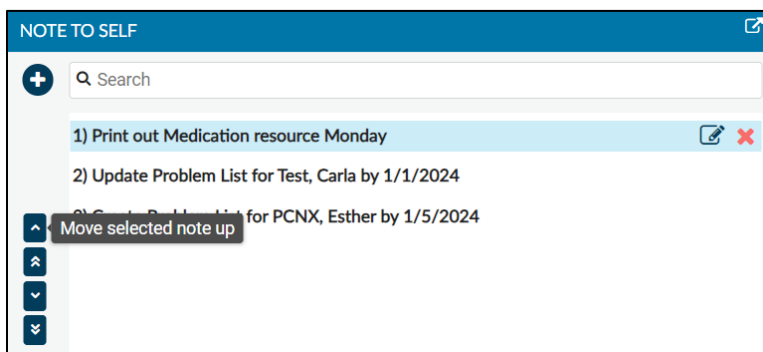
Message Center

The Message Center shows important information pertaining to releases, updates, etc. for PCNX. These messages are updated by the Sage Management Team and cannot be edited or deleted by end users.

Messages will be updated periodically and as needed, so there may be occasions where this is blank.

MESSAGE CENTER
Effective Date: 07/31/2023
Welcome to Sage PCNX-TRAIN!
DO NOT enter real patient information in TRAIN.
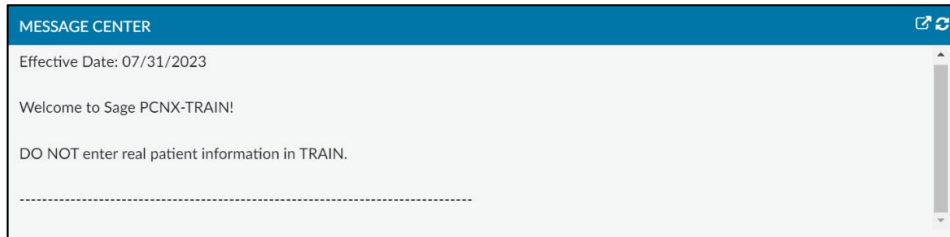
Sage-PCNX Resources

This widget displays functional links to written PCNX resources from the Sage website that will open in a separate browser when clicked. Links will be updated as material is created and/or updated.

SAGE-PCNX RESOURCES
Click Here For Sage-PCNX Training Resources Page
Sage-PCNX Guide to Reports (Updated - January 2024)
Sage-PCNX FAQ Document
Sage-PCNX Progress Note Guide
Sage-PCNX Service Authorization Guide
Click Here to Log Into the SBAT
Click Here for Sage EDI/837 Reference Guides
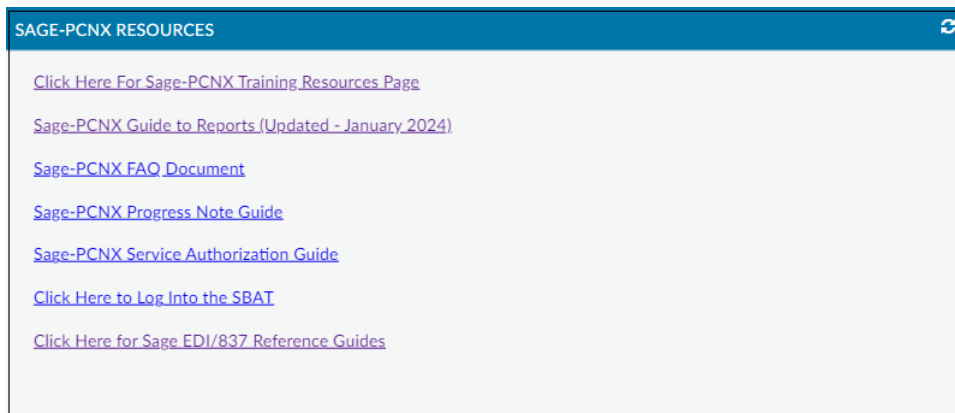
Client Dashboard Widgets

The Client Dashboard comprised of eleven (11) widgets: CLIENT OPEN EPISODES, 270 INQUIRY, PATIENT DIAGNOSES, CLIENT'S CURRENT ELIGIBILITY VERIFICATION, PATIENT ASAM FIALIZATION, PATIENT AUTHORIZATION STATUS, PROGRESS NOTE, CONSOLE WIDGET VIEWER, PROGRESS NOTES (BIRP/GIRP/SIRP/SOAP/MISC), PROBLEM LIST/TREATMENT PLAN and PROVIDER FILE ATTACH.

To open the Client Dashboard, click on the "File Folder" icon, highlighted in red below next to the name of the client listed under Recent Clients:
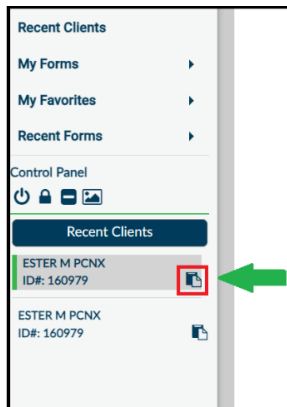
To close the Client Dashboard, click on "Close" highlighted in yellow in the top upper right-hand corner below:
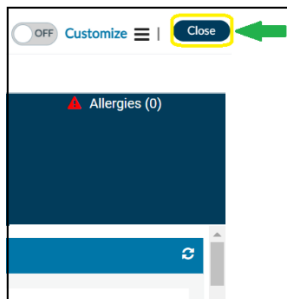
Client Open Episodes

The Client Open Episodes widget displays the agencies with which the patient has had contact. Each patient can have only one episode with a given provider. Admission date is set to the date of first encounter with the agency viewing the data. This widget is intended to provide visibility on other agencies the patient may have received treatment. With the appropriate consent and release of information, providers can then request records or information as needed.

NOTE: SAPC never closes episodes.

CLIENT OPEN EPISODES		
Provider	Episode #	Admit Date
Recovery Inc	1	2022-01-01
SUPR Services	2	2023-07-01

270 Inquiry

The 270 Inquiry widget displays data from the Real Time Inquiry (270) Request form. The Real Time Inquiry (270) Request form directly accesses Medi-Cal eligibility records and receives 271 data instantly providing patient's eligibility information. This widget will only show the most recent twelve (12) 270 inquiries. To access more the twelve 270 inquires, providers should utilize the County and Aid Code Report in PCNX.

There are six (6) sortable, searchable, and filterable columns: PATID, Name of the patient, Admit Date, Submission Date, AID_CODE and CNTY_CODE. Review Sort, Search and Filter for enhanced widget functionality.

270 INQUIRY

Search: [   ]

PATID	Name	Admit Date	Submission Date	AID_CODE	CNTY_CODE
PATID	Name	Admit	Submission	AID_CODE	CNTY_CODE
160797	PCNX, Esther	2023-10-14	2023-10-15	M1	19
160979	PCNX, Esther	2024-01-09	2024-01-09	M1	19
160797	PCNX, Esther	2024-01-09	2024-02-05	M1	19

Showing 1 to 3 of 3 entries

Patient Diagnoses

The Patient Diagnoses widget displays, in one place, any diagnostic information entered on the Diagnosis form. Providers can enter SUD, mental health and/or physical health diagnoses as needed, which will display on the widget. However, the SUD diagnosis should always be the primary diagnosis in Sage.

There are seven (7) sortable, searchable, and filterable columns: PATID, Diagnosis Date, Diagnosis Type, Status, Rank, Diagnosis, and Diagnosis Code.

To quickly access the patient's Diagnosis form, click the "Diagnosis Date" hyperlink under the Diagnosis Date column, as indicated by the date in blue text highlighted in yellow below. Review Sort, Search and Filter for enhanced widget functionality.

PATIENT DIAGNOSES

Search: [   ]

Provider	PATID	Diagnosis Date	Diagnosis Type	Status	Rank	Diagnosis	Diagnosis Code
Provider	PATID	Diagnosis [	Diagnosis 1	Status	Rank	Diagnosis	Diagnosis (
Recovery Inc	160979	01/01/2022	Admission	Active	Primary	Alcohol abuse, uncomplicated	F10.10

Showing 1 to 1 of 1 entries

Client's Current Eligibility Verification

The Client's Current Eligibility Verification widget quickly displays the service(s) for which the patient is currently eligible to receive.

There are four (4) columns: Service, Last Verified Date, Expiration Date and Filed By. Only dates in the past will display as red, indicating the eligibility has expired and needs to be reverified by UM.

CLIENT'S CURRENT ELIGIBILITY VERIFICATION			
Service	**Last Verified Date**	**Expiration Date**	**Filed By**
Non-OTP Services	01/01/2023	07/31/2023	Greg Schwarz, Psy.D.

Patient ASAM Finalization

The Patient ASAM Finalization widget displays the ASAM assessment status a patient has received, and at which Level of Care a patient should be. This only includes the ASAM Comprehensive assessment and not the CO-Triage.

There are seven (7) sortable, searchable, and filterable columns: PATID, Assessment, Provider, date the Assessment was created, Date Finalized (from the Finalize ASAM Assessment Form), Status and the Actual Level of Care.

To access a Patient ASAM form, click the "PATID" hyperlink under the PATID column, as indicated by the number in blue text highlighted in yellow below. Review Sort, Search and Filter for enhanced widget functionality.

PATIENT ASAM FINALIZATION						
Search:						
PATID	**Assessment**	**Provider**	**Created on**	**Date Finalized**	**Status**	**Actual Level of Care**
PATID	Assessment	Provider	Created o	Date Finali:	Status	Actual Le
160979	ComprehensiveAssessment	Recovery Inc	07/17/2023	Missing	Draft	Level 1 - Outpatient Treatment

Patient Authorization Status

The Patient Authorization Status widget shows the selected patient's current and historical service authorizations' status and pertinent information to assist the user gain visibility on authorized and unauthorized services and pending authorizations.

There are twelve (12) sortable, searchable, and filterable columns: Auth#, PATID, Auth Begin Date, Auth End Date, Provider, Program, LOC, Date Requested, Time Requested, Auth Status, Status Reason, Contract#.

NOTE: Contract# is entered by SAPC, not providers, so providers can verify the authorization associated with the correct funding source.

To access a patient's Service Authorization Request form, click the "Auth#" hyperlink under the Auth# column, as indicated by the number in blue text highlighted in yellow below. Like most widgets, to pop

out, click on the icon in the upper right corner highlighted in red below. Review Sort, Search and Filter for enhanced widget functionality.

To close the pop out view, click on the "X" highlighted in red below, which will re-dock the widget in the original location.

Console Widget Viewer

In Client Dashboard the following widgets have the Console Widget Viewer functionality: Progress Note, Progress Notes- BIRP/GIRP/SIRP/SOAP/MISC, and Problem List/Treatment Plan

The functionality of the Console Widget Viewer has been previously described in in the Enhanced Widget Functionality section.

Progress Note

The Progress Note widget lists all the Progress Notes that have been created in Sage-PCNX only for the patient selected.

There are seven (7) sortable columns: Program, Date of Service, Note Type, Service Type, Form Status, Co-Signature Use Only- Draft Ready to Submit?, and Provider Name.

To open a Progress Note record, click on the row, as highlighted in yellow below and then click "Open" at the bottom of the widget, also highlighted in yellow. To create a new Progress Note, click the "New Record," highlighted in red below, which will take the user to the Progress Note form. To view the file attachment in the Console Widget Viewer, click "View," highlighted in orange below under the Action column. Review Console Widget Viewer from the Enhanced Widget Functionality section.

Also review Sort Only for sortability enhanced widget functionality.

Action	Program ⇕	Date of Service ⇕	Note Type ⇕	Service Type ⇕	Form Status ⇕	Co-Signature Use Only - Draft Ready to Submit? ⇕	Provider Name ⇕
View	Recovery Facility (1)	08/31/2023	Individual	Assessment	Final		SCHWARZ,GREG (002683)
View	Recovery Facility (1)	07/20/2023	Individual	Counseling	Final		ORELLANA,ESTI (002769)
View	Recovery Facility (1)	07/20/2023	Individual	Counseling	Final	Yes	ORELLANA,ESTI (002769)
View	Recovery Facility (1)	07/19/2023	Individual	Therapy	Draft	Yes	OLSEN,ALEXAN Q (001114)
View	Recovery Facility (1)	07/12/2023	Individual	Assessment	Draft	Yes	HODGE,SHONN (002827)

Open   New Record

Progress Notes- BIRP/GIRP/SIRP/SOAP/MISC

The Progress Notes widget allows the user to view Miscellaneous Note Options, Progress Note (BIRP)'s, Progress Note (GIRP)'s Progress Note (SIRP)'s, and Progress Note (SOAP)'s. Note that the ability to create new Progress Notes BIRP/GIRP/SIRP/SOAP/MISC has been disabled and they are now Read Only for historical purposes.

There are five (5) sortable columns: Form Description, EP, Date, Last Modified By, and Status.

To open a note, click on the row, as highlighted in yellow below and then click "Open" at the bottom of the widget, also highlighted in yellow. When the historical BIRP, GIRP, SIRP, SOAP or MISC note is opened the fields will be "grayed out" and the user will not be able to edit/add anything to the note as it is now Read-Only.

To view the file attachment in the Console Widget Viewer, click "View," highlighted in orange below under the Action column. Review Console Widget Viewer from the Enhanced Widget Functionality section. Also review Sort Only and for sortability enhanced widget functionality.

Problem List/Treatment Plan

The Problem List/Treatment Plan widget is helpful to quickly access current and historical Problem List/Treatment Plans for the selected patient. The Problem List/Treatment Plan widget can be used to search for the complete list of PL/TPs for more thorough review. In addition, the user can create a new Problem List/Treatment Plan directly from this widget.

There are seven (7) sortable columns: PATID, Episode #, Provider Name, Treatment Plan Date, Plan Type, Problem Date, Finalized Date.

To open a specific Problem List/Treatment Plan, click on the row, as highlighted in yellow below and then click "Open" at the bottom of the widget, also highlighted in yellow. To create a new record, click on "New Record," highlighted in red below. To view the file attachment in the Console Widget Viewer, click "View," highlighted in orange below under the Action column. Review Console Widget Viewer from the Enhanced Widget Functionality section.

Also review Sort Only and for sortability enhanced widget functionality.

Action	PATID ⇕	Episode # ⇕	Provider Name ⇕	Tx Plan Date ⇕	Plan Type ⇕	Problem Date ⇕	Finalized Date ⇕
View	160979	2	Greg Schwarz, Psy.D.	09/11/2023	Update	09/11/2023	09/22/2023
View	160979	1	Greg Schwarz SAPC	07/20/2023	Update	07/20/2023	Draft
View	160979	1	Greg Schwarz SAPC	07/20/2023	Update	07/20/2023	Draft
View	160979	1	Greg Schwarz SAPC	07/18/2023	Update	07/18/2023	07/18/2023
View	160979	1	Greg Schwarz, Psy.D.	07/18/2023	New Plan	07/18/2023	07/18/2023

PROBLEM LIST/TREATMENT PLAN

Open   New Record

Provider File Attach

The Provider File Attach widget shows files that have been attached to a patient record using the Provider File Attach form in Sage-PCNX. The Provider File Attach form will accept any file type to be uploaded, however, only PDF and TIFF will be viewable or printable in the Provider File Attach widget. If other attachment types are uploaded, they cannot be retrieved, but their name will be displayed in the widget.

NOTE: The ProviderConnect File Attach form (different from the Provider File Attach form, which is used to attach files in Sage-PCNX), allows providers access to files that were attached in the previous iteration of ProviderConnect Classic using the Attachments option. The ProviderConnect File Attach form allows for viewing and printing of PDF, txt and image files. These files, however, will not display in the Provider File Attach widget and cannot be downloaded.

There are six (6) columns: Provider, Document Name, Date, Authorization Number, and Document Type.

To view the file attachment, click "View" highlighted in orange under the View column below. The file will open in the Console Widget Viewer on the right. Only files uploaded in Tiff and PDF formats will be visible and printable. Review Console Widget Viewer from the Enhanced Widget Functionality section.

NOTE: Column widths are adjustable. For example, if the user wants to see the document type extension, the width of "Document Name," highlighted in purple below, can be expanded by hovering the mouse between the "Document Name" and "Date" columns until the expand/shrink column image appears ⧎.

In addition, the records are sortable. To sort, click on the column header by which you want to sort, and a little up arrow appears, as highlighted in orange below. Clicking on the column header will sort either in ascending or descending order. That functionality is available for each column.

All Doc/Chart View Widgets

The All Doc/Chart view is comprised of: ALL DOC/CHART PANEL, CLIENT INFORMATION/PATIENT HEADER, ALL DOC/CHART WIDGET, and CONSOLE WIDGET VIEWER.

NOTE: A patient must be selected from the search bar or recent clients list for the All/Doc Chart panel, Client Information/Patient header or All Doc/Chart widget to populate.

Patient Header

The Client Information/Patient displays information from the admission form and can be added/edited by any provider with an open episode for that patient. NOTE: Additions/edits will update the data throughout the system for all providers.

To collapse the Patient Header, click on the up arrow in the upper-right upper corner, highlighted in yellow below.

All Doc/Chart Panel

The All Doc/Chart Panel below works in conjunction with the All Doc/Chart widget and Console Widget Viewer. Available forms are organized under six (6) Sections: PATIENT INFORMATION, ADMISSION/INTAKE, CALOLMS, FINANCIAL ELIGIBILITY, CLINICAL DOCUMENTATION, DISCHARGE. This view is intended to mimic a typical patient chart index and workflow.

When the user clicks on any of the available forms under each Section, a listing of those forms, for that patient, populate the All Doc/Chart Widget, as explained below. To collapse the All Doc/Chart Panel, click on the right arrow in the upper-right hand corner, highlighted in yellow below.

ALL DOC/CHART ▶

PATIENT INFORMATION

Client Picture
Clinical Contact
Collateral Contact
Diagnosis
Drug Testing
Patient Handbook and Orientation
Video Acknowledgement
Patient Medications
Reproductive Health
Update Client Data

ADMISSION/INTAKE

Admission (Outpatient)
Referral Connections
Service Connections Log
Youth and Young Adult Screener

CALOMS

Cal-OMS Administrative Discharge
Cal-OMS Admission
Cal-OMS Annual Update
Cal-OMS Discharge
Cal-OMS Youth/Detox Discharge
CalOMS Supplemental Discharge

FINANCIAL ELIGIBILITY

Eligibility Verification
Financial Eligibility

CLINICAL DOCUMENTATION

Miscellaneous Note Options
Monthly Activity Report
Problem List/Treatment Plan
Progress Note
Progress Note (BIRP)
Progress Note (GIRP)
Progress Note (SIRP)
Progress Note (SOAP)

DISCHARGE

Discharge and Transfer Form
Recovery Bridge Housing Discharge

All Doc/Chart Widget

The All/Doc Chart widget offer significant functionality to assist with more efficient workflows, as detailed below.

After a patient has been chosen, when the All Doc/Chart view is opened the All Doc/Chart widget displays six (6) tabs (see below) that are the six (6) sections displayed in the All Doc/Chart panel (see above). Each tab is populated with forms from that section in which information has been entered. The sections in the All Doc/Chart widget are PATIENT INFORMATION, ADMISSION/INTAKE, CALOMS, FINANCIAL ELIGIBILITY, CLINICAL DOCUMENTATION, and DISCHARGE, as highlighted in yellow below.

Displayed in the widget are:

FORM DESCRIPTION	Name of the form
EPISODE	Agency with which the patient has had contact
DATE	Date of diagnosis
TIME	Time of diagnosis
DATA ENTRY BY	Form created by
WORKFLOW STATUS	From Status

NOTE: Each patient can have only one episode with a given provider.

Each Section of forms is sortable. Review Sort Only and for enhanced widget functionality.

Tip: *All column widths in each tab listed in the All Doc/Chart widget are adjustable. Simply hover the mouse between the two columns until the expand/shrink column image appears* ⁘. *NOTE: columns will re-set once you the user leaves the All Doc/Chart View or logs out of* Sage-PCNX.

To open a form, click on the form to highlight it, then click "Open," both highlighted in yellow below.
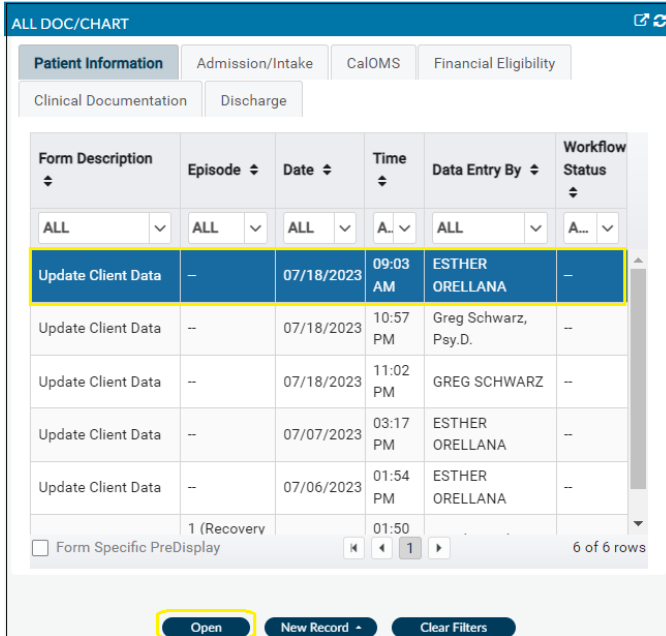
To create a new form, click "New Record," highlighted in yellow below. A box listing forms associated with that category are displayed. Click on the form for which the user would like to create a new record.
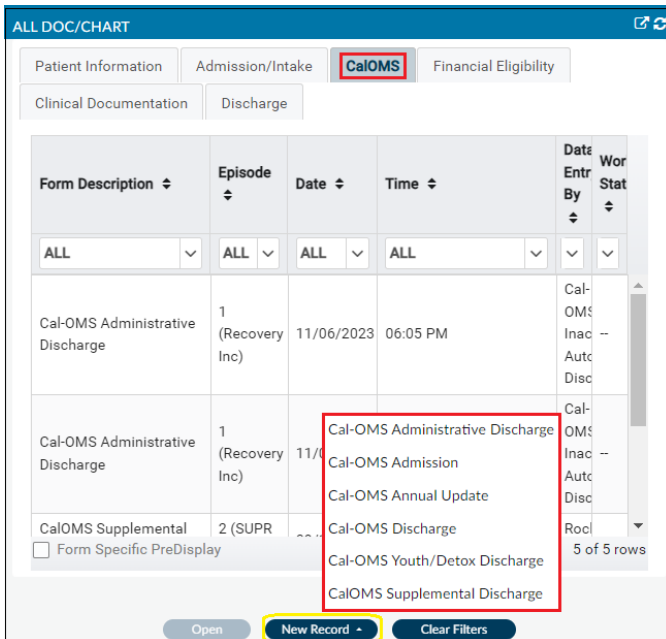
The user can also filter forms. Click on "ALL" in the column for which the user would like filtered forms, as highlighted in yellow below. Chose the filter(s), then click on the "X" highlighted in red below.

NOTE: The user can choose more than one column to filter. To clear all filters, click "Clear Filters" highlighted in green below.
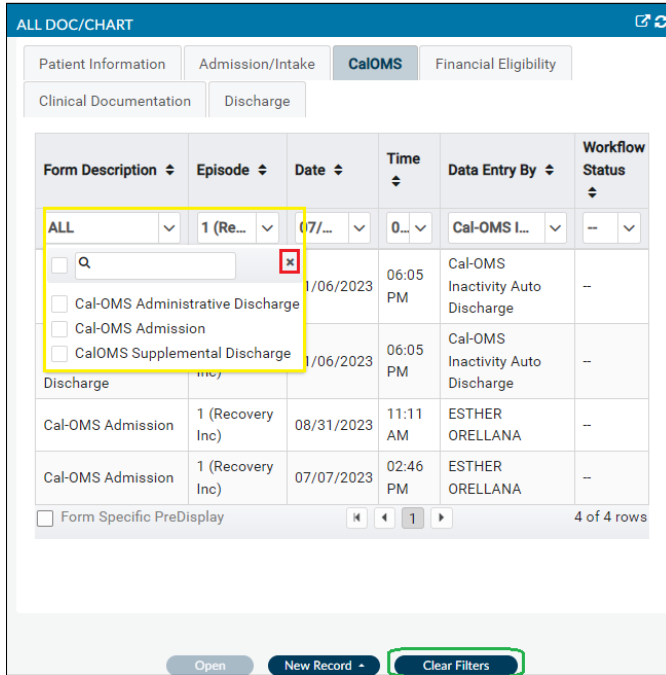
In the example below, the CalOMS Section was chosen, and the forms were filtered by Form Description, "Cal-OMS Admission," all highlighted in yellow. Again, to clear all filters, click "Clear Filters" highlighted in green below.
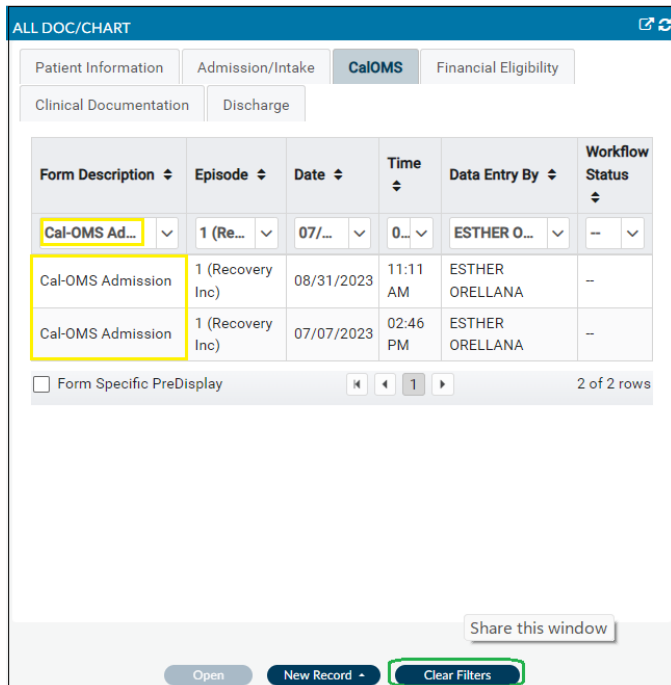
Form Specific PreDisplay

The User can view additional information in the All Doc/Chart widget for one (1) filtered form type. After one form type has been filtered the user checks the "Form Specific PreDisplay" box, highlighted in red below, to display additional information. NOTE: If more than one form type from is filtered, then the "Form Specific PreDisplay" option, highlighted in red below, will be grayed out.

Additional information associated with that form is then displayed, highlighted in yellow below. NOTE: Each form will have its own specific additional information after clicking "Form Specific PreDisplay."

To clear all filters, click on "Clear Filters," highlighted in green below. Unchecking "Form Specific PreDisplay" will return the user to the default view.

Console Widget Viewer

Any record from any of the sections of the All Doc/Chart Widget can be viewed in the Console Widget Viewer by double clicking on the row in the All Doc/Chart, as highlighted in yellow below. Review Console Widget Viewer from the Enhanced Widget Functionality section.

Clinical Only View Widgets

The Clinical Only view is comprised of three (3) widgets: PROGRESS NOTE, PROBLEM LIST/TREATMENT PLAN, and PATIENT AUTHORIZATION STATUS.

NOTE: A patient must be selected from the search bar or recent clients list for the All/Doc Chart panel, Client Information/Patient header or All Doc/Chart widget to populate.

The Clinical Only view was designed for only those users who have access to clinical forms for quick compliance view (e.g., what's in draft, what has been finalized). Additional information can be found in the Client Dashboard, All Doc/Chart view or the form itself.

Progress Note

The Project Note widget lists all the Progress Notes that have been created for the patient selected.

There are seven sortable (7) columns: Date of Service, Note Type, Service Type, Form Status, Co-Signature Use Only- Draft Ready to Submit?, and Provider Name.

To open a record, highlight the record and then click "Open," highlighted in yellow below. To create a new record, click "New Record," highlighted in red below. Review Sort Only and for enhanced widget functionality.

PROGRESS NOTE

Program ⇕	Date of Service ⇕	Note Type ⇕	Service Type ⇕	Form Status ⇕	Co-Signature Use Only - Draft Ready to Submit? ⇕	Provider Name ⇕
Recovery Facility (1)	03/07/2024	Individual	Counseling	Draft		SZUHAY,DANIEL (003177)
Recovery Facility (1)	08/31/2023	Individual	Assessment	Final		SCHWARZ,GREG (002683)
Recovery Facility (1)	07/20/2023	Individual	Counseling	Final		ORELLANA,ESTHER (002769)
Recovery Facility (1)	07/20/2023	Individual	Counseling	Final	Yes	ORELLANA,ESTHER (002769)
Recovery Facility (1)	07/19/2023	Individual	Therapy	Draft	Yes	OLSEN,ALEXANDRA Q (001114)

Open   New Record

Problem List/Treatment Plan

The Problem List/Treatment Plan widget is helpful to quickly access an updated, or new Problem List/Treatment Plan so providers can check on what current issue(s) or treatment(s) a patient is working.

There are seven (7) columns: PATID, Episode #, Provider Name, Treatment Plan Date, Plan Type, Problem Date, Finalized Date.

To open a record, highlight the record and then click "Open," highlighted in yellow below. To create a new record, click "New Record," highlighted in red below. Review Sort Only and for enhanced widget functionality.

PROBLEM LIST/TREATMENT PLAN						
PATID ⬍	Episode # ⬍	Provider Name ⬍	Tx Plan Date ⬍	Plan Type ⬍	Problem Date ⬍	Finalized Date ⬍
160979	2	Greg Schwarz, Psy.D.	09/11/2023	Update	09/11/2023	09/22/2023
160979	1	Greg Schwarz SAPC	07/20/2023	Update	07/20/2023	Draft
160979	1	Greg Schwarz SAPC	07/20/2023	Update	07/20/2023	Draft
160979	1	Greg Schwarz SAPC	07/18/2023	Update	07/18/2023	07/18/2023
160979	1	Greg Schwarz, Psy.D.	07/18/2023	New Plan	07/18/2023	07/18/2023

Open   New Record

Patient Authorization Status

See Patient Authorization Status from the Client Dashboard Widgets section.

Financial Only View Widgets

The Financial Only view is comprised of four (4) widgets: CALPM ELIGIBILITY CHECK, AUTHORIZATION STATUS- LAST 3 MONTHS, PATIENT BILLING HISTORY, and PROVIDER AUTHS (PAUTHS).

The Financial Only view was designed for only those users who have access to financial forms to enhance the billing workflow and provide visibility on potential errors that may result in denials before billing commences.

CALPM Eligibility Check

The CALPM Eligibility Check widget populates data for patients with missing or incorrect data on the Financial Eligibility and/or Diagnosis form that may lead to claim denials for "Eligibility Not Found/Verified in CalPM." Sage checks for certain data elements that are needed to bill Medi-Cal. If those elements are missing, Sage is set to deny those claims locally. This widget populates the most common errors found in Sage, including if: 1. Eligibility Verified is marked No, 2. Coverage Expiration Date is prior to the date of service, 3. Missing CIN on the DMC guarantor. If any of those are met, the patient will show on the widget, indicating the claim will deny. Additionally, the Diagnosis column is added to provide visibility on the current diagnosis type. All claims must have an Admission Type of Diagnosis in the record. If this column shows a diagnosis type other than Admission, providers should double check to ensure there is an existing admission diagnosis. Update diagnoses are permissible and best practice for each new treatment admission, however, cannot be the only diagnosis on record. Providers should review the Claim Denial Crosswalk and guides for more information about this and other denials. For additional information: Sage Trainings/Finance.

There are nine (9) sortable, searchable, and filterable columns: PATID, Program, EP#, Guarantor, Eligibility Verified, Coverage Effective Date, Coverage Expiration Date, CIN, and Diagnosis Type.

Review Sort, Search and Filter for enhanced widget functionality.

Authorization Status- Last 3 Months

The Authorization Status- Last 3 Months widget allows the user to view the authorization status for service authorizations that were submitted in the past three months. This information is also available on the Authorization Request Status Report for all authorizations; however, the widget provides visibility for the most recent authorizations for easy follow up and actions in cases where the authorization has been denied or remains pending.

There are twelve (12) sortable, searchable, and filterable columns: Authorization #, PATID, Authorization Begin Date, Authorization End Date, Provider, Program, LOC, Date Requested, Time Requested, Authorization Status, Status Reason, and Contract #.

To open a specific Authorization, click the "Auth#" hyperlink under the Auth# column, as indicated by the blue text number highlighted in yellow below. Review Sort, Search and Filter for enhanced widget functionality.

Patient Billing History

The Patient Billing History widget provides a concise view of a patient's billing history for any actions or reporting needs without the need to open a report to view a single patient.

There are fourteen (14) sortable, searchable, and filterable columns: Name (PATID), Program, Date of Service, Procedure, Provider Name, Status, Original Disbursement, Updated Disbursement, Date Batch Created, Takeback Date, Voided By, BATCHID, EOBID, EOB Check Number.

Review Sort, Search and Filter for enhanced widget functionality.

For a full screen view, click on the pop out button in the upper right-hand corner, highlighted in yellow below.

Below is a pop-out view. To close the pop out view, click on the "X" highlighted in red below, which will re-dock the widget in the original location.

Name	Program	DOS	Procedure	ProviderName	Status	OriginalDisbursement	UpdatedDisbursement	date_batch_created	TakebackDate	VoidedBy	BATCHID	EOBID	eob_check_number	BilledtoState
Name	Program	DOS	Procedure	ProviderName	Status	OriginalDisbursement	UpdatedDisbursement	date_batch_created	TakebackDate	VoidedBy	BATCHID	EOBID	eob_check_number	BilledtoState
160979	Recovery Facillity	2023-08-01	90791:U7	HINDMAN,DAVID	A	91.37	91.37	2023-09-11	N/A	N/A	22900			No
160979	Recovery Facillity	2023-08-01	T1013:U7	HINDMAN,DAVID	A	30	30	2023-09-11	N/A	N/A	22900			No
160979	Recovery Facillity	2023-08-01	90791:U7	ORELLANA,ESTHER	A	91.37	91.37	2023-08-02	N/A	N/A	22876	12708	123456 Fake	No
160979	Recovery Facillity	2023-08-01	T1013:U7	ORELLANA,ESTHER	A	30	30	2023-08-02	N/A	N/A	22876	12708	123456 Fake	No
160979	Recovery Facillity	2023-07-31	90846:U7	HINDMAN,DAVID	A	200	200	2023-09-11	N/A	N/A	22900			No

Provider Auth (PAuths)

The Provider Auth (PAuths) widget shows provider level authorizations. PAuths are preapproved authorizations for the agency to deliver specific services to all patients without the need to request a member authorization.

There are five (5) sortable, searchable, and filterable columns: Provider, Authorization #, Authorization Begin Date, Authorization End Date, Level of Care.

Review Sort, Search and Filter for enhanced widget functionality.

Provider	Auth#	Auth Begin Date	Auth End Date	Level of Care
Provider	Auth#	Auth Begin Date	Auth End Date	Level of Care
Recovery Inc	P12386	2023-07-01	2024-06-30	ASAM 3.1 - Perinatal-PPW
Recovery Inc	P12410	2023-07-01	2024-06-30	ASAM 1.0

Showing 1 to 2 of 2 entries

Financial + Clinical View Widgets

The Financial + Clinical view is comprised of eight (8) widgets: PROGRESS NOTE IN DRAFT- 1 MONTH, ASAM CONTINUUM IN DRAFT, PROBLEM LIST/TREATMENT PLAN COMPLIANCE, AUTHORIZATION STATUS- LAST 3 MONTHS, PENDING AUTHORIZATIONS- PREVIOUS 1 YEAR, PATIENT BILLING HISTORY, CALPM ELIGIBILITY CHECK, and PATIENT LIST/TREATMENT PLAN REMINDER

The Financial + Clinical Only view was designed only for those users who have access to both clinical and financial forms for quick compliance view (e.g., what's in draft, what has been finalized) and to enhance the billing workflow and provide visibility on potential errors that may result in denials before billing commences.

Progress Note in Draft– 1 Month

The Progress Note in Draft- 1 Month widget is for LPHA's to quickly review Progress Notes that require the LPHA's signature and/or for supervisor to assure staff are finalizing notes. This widget will only show Progress Notes in draft for the last 30 days based on the submission date.

There are nine (9) sortable, searchable, and filterable columns: PATID, Program, Note Date, Submission Date, Provider Name, Note Type, Service, Status, Co-Signature Required.

If there is a Yes in the "Co-Signature Required" field, that indicates that the note requires LPHA review and signature.

To open a specific Progress Note in Draft, click the "Note Date" hyperlink under the Note Date column, as indicated by the blue text number highlighted in yellow below. Review Sort, Search and Filter for enhanced widget functionality.

PATID	Program	Note Date	Submission Date	Provider Name	Note Type	Service	Status	Co-Signature Required
PATID	Program	Note Date	Submission Date	Provider Name	Note Type	Service	Status	Co-Signature Rec
160979	Recovery Facility	2024-02-09	2024-02-12	SZUHAY,DANIEL	Individual	Counseling	Draft	

Showing 1 to 1 of 1 entries

ASAM Continuum in Draft

The ASAM Continuum in Draft widget tracks the status of the ASAM Continuum in draft, which is helpful for users to easily review prior to finalization.

There are seven (7) sortable, searchable, and filterable columns: Name, PATID, Episode, Provider, Created On, Form Status, and Actual Level of Care.

Review Sort, Search and Filter for enhanced widget functionality.

Problem List/Treatment Plan Compliance

The Problem List/Treatment Plan Compliance widget, like the The Progress Note in Draft- 1 Month widget above, is for LPHA's to quickly review Problem List/Treatment Plan(s) that require the LPHA's signature and/or for supervisor to assure staff are finalizing notes.

There are ten (10) sortable, searchable, and filterable columns: PATID, Provider Name, Program, Treatment Plan Date, Date Submitted, Plan Type, Review Date, Update Due, Form Status, Co-Signature Needed.

To open a specific Problem List/Treatment Plan thru the widget, click the "Tx Plan Date" hyperlink under the Tx Plan Date column, as indicated by the blue text number highlighted in yellow below. Review Sort, Search and Filter for enhanced widget functionality.

Authorization Status- Last 3 months

See Authorization Status- Last 3 months from the Financial Only View Widgets section.

Pending Authorizations- Previous 1 Year

The Pending Authorizations- Previous 1 Year widget display authorizations that are pending UM adjudication for the past rolling 1-Year period.

There are ten (10) sortable, searchable, and filterable columns: PATID, Name, Authorization # Program, Submitter Name, Begin Date, End Date, Authorization Status, Status Reason, Plan Name.

If the incorrect Benefit Plan was chosen, then in the "Status Reason" column "Wrong Benefit Plan Selected" will be displayed. To open a specific Service Authorization Request thru the widget, click the "Auth#" hyperlink under the Auth# column, as indicated by the blue text number highlighted in yellow below. Review Sort, Search and Filter for enhanced widget functionality.

PATID	Name	Auth#	Program	Submitter Name	Begin Date	End Date	Auth Status	Status Reason	Plan Name
PATID	Name	Auth#	Program	Submitter Na	Begin I	End D	Auth St	Status R	Plan N
			Facillity		17	30		Review	Old
160979	PCNX,ESTER M	112725	Recovery Facillity	Daniel Szuhay	2024-03-08	2024-09-03	Pending	Not Reviewed	RBH - Recovery Bridge Housing
161621	SZPCNX,DANIEL	112684	Recovery Facillity	Daniel Szuhay	2024-01-16	2024-04-15	Pending	Not Reviewed	ASAM 2.1

PENDING AUTHORIZATIONS- PREVIOUS 1 YEAR

Patient Billing History

See Patient Billing History from the Financial Only View Widgets section.

CALPM Eligibility Check

See CALPM Eligibility Check from the Financial Only View Widgets section.

Problem List/Treatment Plan Reminder

The Problem List/Treatment Plan Reminder Widget allows users to track upcoming review and update dates more easily for problem lists/treatment plans. The widget includes necessary fields to quickly assess due dates. The widget will populate all problem lists/treatment plans with a Tx Plan Date within the previous 45 days. There is additional logic for color coding of the Next Review and Update Due Date fields as follows, both highlighted in purple below:
1. To show as red if the dates are 7 days past due from the current date or due the following day.
2. To show as orange if the due dates are between 2 to 7 days from the current date.
3. To show as green if the due dates are between 8 days and 30 days from the current date.

The Problem List/Treatment Plan Reminder Report can be used to search for the complete list of PL/TPs by any date range for more thorough review.

There are ten (10) sortable, searchable and filterable columns: Name, PATID, Provider Name, Program, Tx Plan Date, Date Submitted, Plan Type, Next Review, Update Due Date, Form Status

To open a specific Problem List/Treatment Plan thru the widget, click the "Tx Plan Date" hyperlink under the Tx Plan Date column, as indicated by the blue text number highlighted in yellow below. Review Sort, Search and Filter for enhanced widget functionality.

PROBLEM LIST/TREATMENT PLAN REMINDER

Search:

| Name	PATID	Provider Name	Program	Tx Plan Date	Date Submitted	Plan Type	Next Review	Update Due Date	Form Status
Name	PATID	Provider Nam	Program	Tx Plan Da	Date Submittec	Plan Type	Next Review	Update Due C	Form Status
PCNX,ESTER MIDDLE MS	160919	Esther Orellana	Recovery Facility	2024-02-14	2024-03-01	Update	03/05/2024	03/09/2024	Final
PCNX,ESTER MIDDLE MS	160919	Esther Orellana	Recovery Inc	2024-02-18	2024-03-01	Update	03/05/2024	03/09/2024	Final
PCNX,GREG MIDDLE	161059	Greg Schwarz, PsyD	Recovery Inc	2024-02-01	2024-02-13	New Plan	02/07/2024	02/13/2024	Final
PCNX,GREG MIDDLE	161059	Daniel Szuhay	Recovery Inc	2024-02-02	2024-02-13	New Plan	02/07/2024	02/13/2024	Final

SBAT View Widgets

The SBAT view is comprised of four (2) widgets: SERVICE BED AVAILABILITY TOOL and SBAT LOGIN

Service Bed Availability Tool

The Service Bed Availability Tool (SBAT) widget provides direct access to the SBAT web-based tool that provides a dashboard of available substance use services throughout Los Angeles County, including: outpatient and intensive outpatient treatment, different levels of residential treatment, withdrawal management, Opioid Treatment Programs (methadone clinics), Recovery Bridge Housing, and DUI programs.
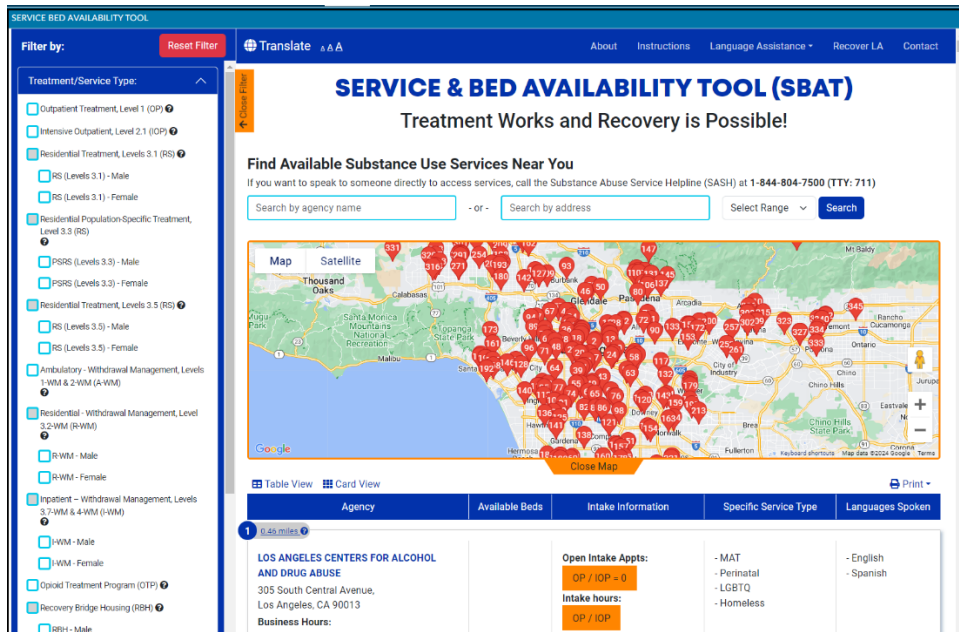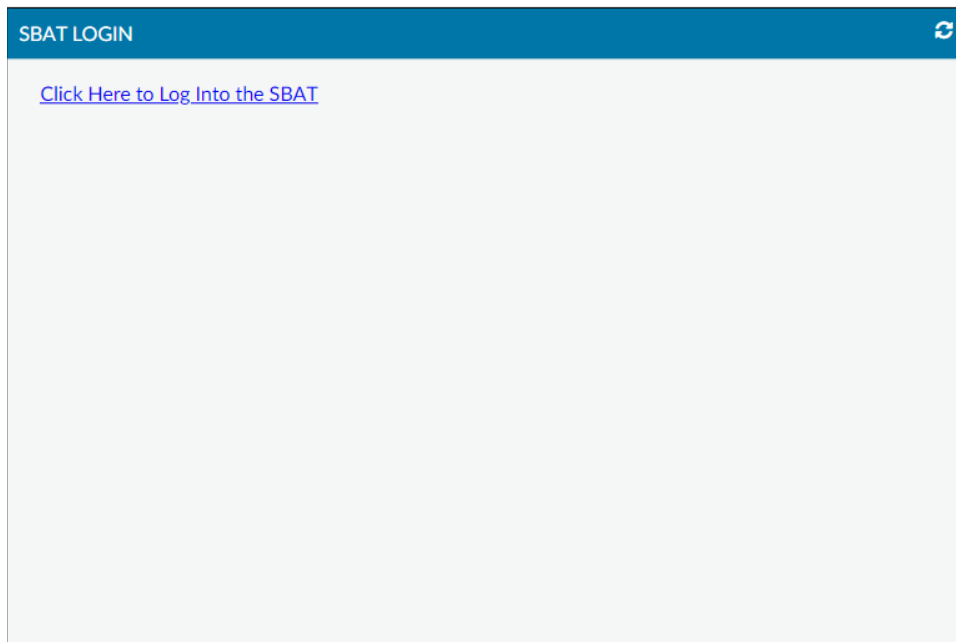

Filters Include Treatment Service Type, Languages Spoken, Client Served and 3 Additional filters highlighted below.
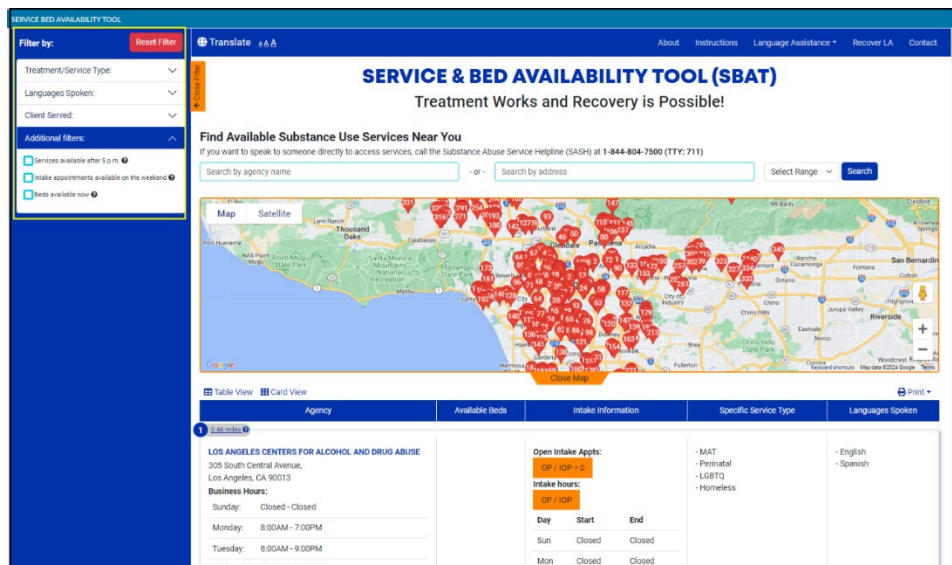
SBAT Login

By clicking on the "Click Here to Log Into the SBAT" in the SBAT Login widget, the Provider can directly access SBAT to update their agency(ies) availability.

| SBAT LOGIN	⟳
Click Here to Log Into the SBAT	

Fast Service Entry Submission Widget

Included with Fast Service Entry Submission there is one (1) widget: APPROVED AUTHS FOR BILLING-PAST MONTH. This widget appears in the upper right-corner hand corner when Fast Service Entry Submission is opened.

Approved Auths for Billing- Past Month

The Approved Auths for Billing- Past Month widget was requested by providers for easy, quick viewing while doing current billing of authorizations that have been approved during the previous month. With this widget, billers can see for whom they need to bill from the last month since billing is always one month behind.

There are nine (9) sortable, searchable, and filterable columns: Patient Name, PATID, Authorization #, Fund Service, Begin Date, End Date, Program, Level of Care, and Status.
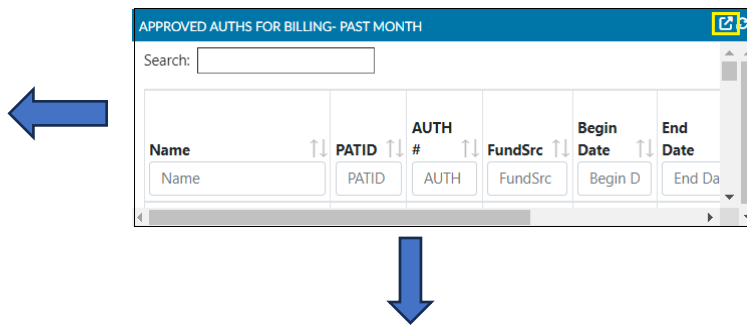
NOTE: The view can be expanding by dragging the bottom and/or right side, as indicated by the arrows above.

For a full screen view, click on the pop out button in the upper right-hand corner, highlighted in yellow above. Review Sort, Search and Filter for enhanced widget functionality.

Pop out view