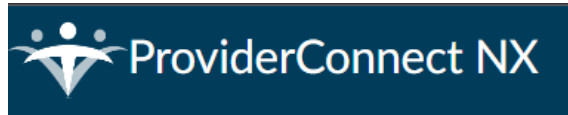




Substance Use Disorder Information System



Provider File Attach Job Aid

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Introduction

The Sage-PCNX Provider File Attach form allows users to attach files to a patient’s record, thereby providing the user a place to store various documents in one place related to the patient’s treatment as part of the patient’s record.

Through the process of uploading files into the Provider File Attach form, users will designate the “type” of file that is being attached. For example, when the user uploads a completed/signed Release of Information SAPC In-Network Providers form, the uploaded file can be designated as a Release of Information (“File Type”)/ROI Internal (“Document Type”) file. This will make tracking the different files uploaded for each patient easier by viewing thru a patient’s Provider File Attach widget/Console Widget

Viewer in the Client Dashboard view and thru the forthcoming Provider File Attach Report. More information about viewing and printing attached files thru a patient’s Client Dashboard is provided later in this Job Aid and in the Sage-PCNX Guide to Widgets,
<http://publichealth.lacounty.gov/sapc/docs/providers/sage/pcnx/PCNX-Guide-Widgets.pdf>

Provider File Attach

The Provider File Attach form is comprised of nine (9) fields, Member ID, Provider, File Type, Authorization, Document Type, File Name, Comments, Comment History, and Existing Files.

The form also has three (3) “process options,” Upload File, Store File, and Update Comments.

Note:

- The “Submit” button will always be grayed out. Uploading files and/or adding comments to uploaded files is done by clicking on one of the “process options.” See below for further explanation.

Users can upload either PDF or TIFF files into a patient’s records thru the Provider File Attach form. PDF and TIFF files uploaded thru the Provider File Attach form are the only files viewable and/or printable thru the Provider File Attach widget.

Field	Description
Member ID (Required)	Enter either patient last name, first name or PATID
Provider (Required)	Enter Provider
File Type (Required)	A drop-down menu of general categories of the type of document that is being uploaded
Authorization	A drop-down menu of authorizations – Required if Authorization File Type is chosen
Document Type (Required)	A drop-down menu of specific values to provide more specificity of the document uploaded
File Name	SAPC strongly encourages that providers follow a file naming convention prior to uploading (See Appendix A)
Comments	Enter any comments related to the uploaded document
Existing Files	Drop-down menu of files uploaded
Comment History	Displays history of comments previously added to the uploaded file

Process Options	Description
Upload File	Click to upload a file
Store File	After a file has been upload, click “Store File” to store the file. Note that once a file has been stored, no further actions are necessary. The Submit button will always be grayed out.
Update Comments	After a user has entered comments, click “Update Comments” to store the comments. Note that once comments have been updated, no further actions are necessary. The Submit button will always be grayed out.

The screenshot shows a web form for uploading files. On the left side, there are several input fields: 'Member ID *', 'Provider *', 'File Type *' (a dropdown menu), 'Authorization' (a dropdown menu), and 'Document Type (Required) *' (a dropdown menu). Below these is an 'Upload File' button and a 'File Name' text input field. On the right side, there is a large 'Comments' text area with a copy icon. Below the comments area is an 'Existing Files' dropdown menu and an 'Update Comments' button. At the bottom right, there is a 'Store File' button. At the bottom left, there is a 'Comment History' section with a copy icon.

Uploading a File

Prior to uploading a file into the Sage-PCNX Provider File Attach form, the file will need to be named and saved on the user's computer. SAPC strongly encourages providers to use the following standardized naming format to name files prior to uploading attachments into Sage thru the Provider File Attach form:

Document Type-Date (MM-DD-YY)-Patient's First & Last Initial-PATID

See Appendix A for standardized file naming examples and additional information.

File Type

The "File Type" field has been updated and expanded with new choices to clearly indicate the type of file being attached. The new choices represent general categories of the type of document that is being uploaded, e.g. ASMA, Discharge, Release of Information, etc. This is a REQUIRED field.

Document Type

The "Document Type" field has also been updated and expanded with new document type choices. The new choices represent specific values to provide more specificity of the document uploaded. This is a REQUIRED field.

The grouping of File Type and Document Type noted in the table below is suggested by SAPC to use when associating a Document Type to a File Type. However, users will have the ability to choose any Document Type from the list, as it is not filtered by File Type.

Table of File and Document Types

File Type	Document Type
ASAM	ASAM CO Triage ASAM Continuum ASAM Narrative ASAM Paper-Based ASAM Screener for Youth and Young Adults ASAM Summary
Assessment	Screening Substance Use Screener
Authorization	Initial Reauthorization
Behavior Contracts	Behavior Contract
Beneficiary Documents	BenefitsCal Change Report Medi-Cal Card/BIC Notice of Action
CalOMS	CalOMS - Admission CalOMS - Annual CalOMS - Discharge CalOMS - Youth Detox Discharge
Care Coordination/Referrals	Community Referrals DPSS Programs Housing Referrals Medical Referrals School Document Social Services
Certificates	Program Completion Step down
Consents/Notice of Privacy Practices	Consent for Treatment Informed Consent Notice of Privacy Practices
Contacts/Collateral	Collateral Emergency Contacts
Criminal Justice	AB-109 Court Orders Court Order Treatment Minute Orders Parole Forms Probation Forms START
Discharge	RBH Discharge Discharge and Transfer Discharge Planning Discharge Referrals
Financial Eligibility Verification	271 Results Financial Eligibility MediCal/AEVS Results

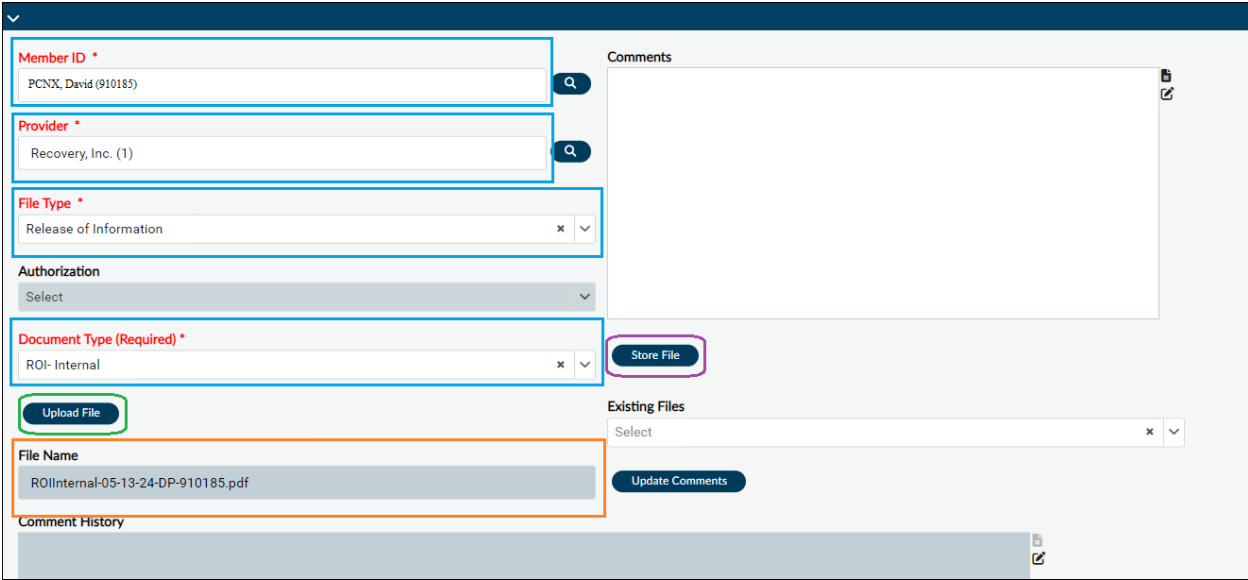
	Other County Funding
History and Physical	DHCS Health Questionnaire H and P Medical Records
Intake	Intake Packet Medi-Cal Card/BIC Patient Handbook
Labs	Drug Testing- Blood Medical Labs UA
MAT	MAT Consultation MAT Education
Medication	Administration Dosing MAR/Med Logs Safeguarding Storage
OHC	Approved EOB Co-Pay Denied EOB OHC- Invoice OHC- Statement
Other	Other
Physician/Prescriber Note	MD Note with EDD Physician/Prescriber Note- MAT Physician/Prescriber Note- Other
Pregnancy Status	Proof of Delivery/Birth
Problem List	Initial Problem List- Deletion Update
Progress Note	Assessment Note Append/Correction Documentation Group Individual Medical Necessity Justification Miscellaneous Note Problem List/Treatment Plan Note Void Documentation
Release of Information	ROI- Internal ROI- External
Residential	Mental Health Services Outside Groups Physical Health Services Treatment Hours
Treatment Plan/Care Plan	Initial Plan of Care - Peer Support Update

Process to Upload a File

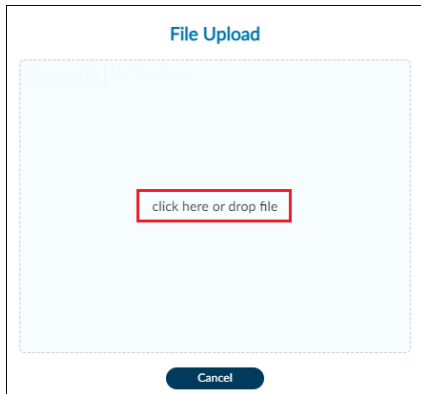
- Enter the patient’s name (last name, first name) or PATID in the “Member ID” field and name of the provider in the “Provider” field, highlighted in blue below. Both are REQUIRED.
- Choose from one of file types from the “File Type” field, highlighted in blue below. This field is REQUIRED.

Note:

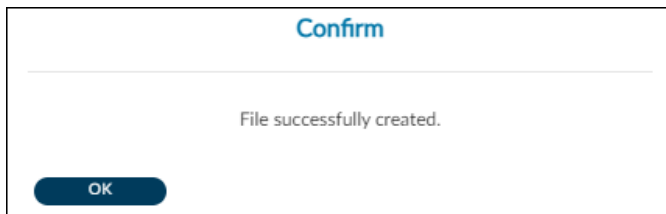
- If the user chooses the “Authorization File Type,” then the “Authorization” field becomes available and is REQUIRED to be completed. “Authorization” is used to attach files to specific authorizations, which are displayed in a drop-down menu in the “Authorization” field.
- The “Provider” File Type does not have any recommended corresponding “Document Type” choices. SAPC does not recommend that the user select the “Provider” File Type, as the “Provider” File Type indicates that the file is not patient specific and therefore shouldn’t be attached to a patient’s chart.
- Choose from one of the document types from the “Document Type” field, highlight in blue below. This field is REQUIRED.
- To choose a file to upload, click on “Upload File,” highlighted in green below.



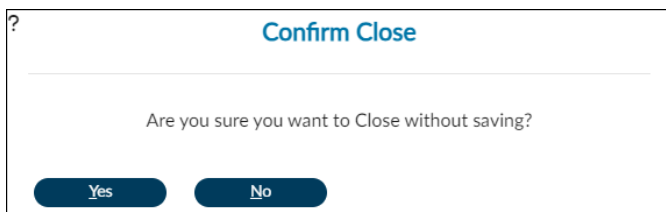
- After choosing “Upload File,” the following will pop-up.



- A pop-up directory of files/folders on your computer will also open. If a directory does not automatically open, then click on “click here or drop file,” highlighted in red above.
 - If the user is not ready to upload a file, click “Cancel” to cancel and go back to the Provider File Attach form.
- While in the “File Upload” box, choose the file the user wishes to upload. After the file is uploaded, the file name will be displayed in the “File Name” field, highlighted in orange above.
- To attach the file, click on “Store File,” highlighted in purple above. Once the user clicks on “Store File,” the file will have been “attached” to the patient’s record.
- Once the file has been uploaded the following screen will pop-up. Click on “OK” to close this screen.



- No further action is necessary unless the user wants to add a comment (see below for guidance).
- If the user does not want to add a comment, click on “Discard” and the following screen will pop-up.



- As noted above, the “Submit” button will always be grayed out and will not be an option to click.
- Click “Yes” to exit Provider File Attach. There is nothing to “Save” at this step, as the file has already been attached when the user chose “Store File” from above.

Adding/Viewing Comments

Comments can be added to the Provider File Attach form while uploading a file or after a file has been uploaded. Once comment(s) have been added to an attached file, they can also be viewed at a later time in the Provider File Attach form.

Process to add a comment while uploading a file:

- After the file has been uploaded, type the comment in the “Comments” free text box, highlighted in orange and click “Update Comments,” highlighted in purple.

The screenshot shows a web form for adding a file. On the left, there are several fields: Member ID (PCNX, David (910185)), Provider (Recovery, Inc. (1)), File Type (Release of Information), Authorization (Select), Document Type (Required) (ROI- Internal), and File Name (ROIInternal-05-13-24-DP-910185.pdf). On the right, there is a 'Comments' text area containing the text 'This is the patient's 1st ROI at Recovery, Inc.', which is highlighted with an orange border. Below the comments area is a 'Store File' button. At the bottom right, there is an 'Existing Files' dropdown menu and an 'Update Comments' button highlighted with a purple border. A 'Comment History' section is visible at the bottom left.

- After clicking on “Update Comments,” the following screen will pop-up. Click on “OK” to close this screen.

The dialog box has a title bar that says 'Confirm'. Below the title bar, the text reads 'File successfully created.' At the bottom of the dialog box, there is a single button labeled 'OK'.

- After the comment has been added, click on “Discard” and the following screen will pop-up.

The dialog box has a title bar that says 'Confirm Close'. Below the title bar, the text reads 'Are you sure you want to Close without saving?'. At the bottom of the dialog box, there are two buttons: 'Yes' and 'No'.

- As noted above, the “Submit” button will always be grayed out and will not be an option to click.

- Click “Yes” to exit Provider File Attach. There is nothing to “Save” at this step, as the comment has already been stored when the user chose “Update Comments” from above.

Process to add to, or view comments in previously stored files:

- Open the Provider File Attach form and choose “Member ID” and “Provider,” highlighted in green below.
- Then click on “Select” below “Existing Files” or the down arrow to the right of “Select,” highlighted in purple below.
- Files associated with the previous fields selected will appear in a drop-down menu, highlighted in orange below.

Note:

- If the User also chooses a “File Type” while accessing previously stored files, then only those files associated with the “File Type” will be displayed in the “Existing Files” drop-down menu choices.

The screenshot displays the Provider File Attach form. On the left side, there are several input fields: 'Member ID *' with the value 'PCNX, David (910185)', 'Provider *' with 'Inc. Recovery (1)', 'File Type *' with a 'Select' dropdown, 'Authorization' with a 'Select' dropdown, and 'Document Type (REQUIRED) *' with a 'Select' dropdown. Below these are buttons for 'Upload File' and 'Store File'. On the right side, there is a 'Comments' text area and an 'Existing Files' dropdown menu. The 'Existing Files' dropdown is highlighted in purple, and its list of options, 'ROIExternal-01-13-24-DP-910185' and 'ROIInternal-01-13-24-DP-910185', is highlighted in orange. At the bottom, there are sections for 'File Name' and 'Comment History'.

To add comments to previously stored files:

- Choose the file to which comments will be attached. Then type the comment in the “Comments” free text box and click “Update Comments,” as previously described.

To view comments in previously stored files:

- Choose the file from the “Existing Files” drop-down menu choices that contains the comments the user would like to view, as highlighted in purple below.
- The comments will appear in the Comment History box, highlighted in orange below.

Once done adding a comment to, or viewing a comment in a previously stored file:

- Click on “Discard” and the following screen will pop-up.

- As noted above, the “Submit” button will always be grayed out and will not be an option to click.
- Click “Yes” to exit Provider File Attach. There is nothing to “Save” in this pop-up box, as the comment has either been saved or viewed.

Viewing and Printing Attached Files thru the Console Widget Viewer

Files attached thru the Sage-PCNX Provider File Attach form can be both viewed and printed thru a patient’s Client Dashboard view. In the Client Dashboard view, the Provider File Attach widget shows a listing of files that have been attached to a patient’s record using the Provider File Attach form. As noted earlier, users can upload either PDF or TIFF files into a patient’s records and PDF and TIFF files are the only files viewable and/or printable.

- While in the patient’s Client Dashboard view, the user navigates to the Provider File Attach widget.
- To view an attached file, click “View” under the View column next to the attached file in the Provider File Attach widget.
- A Read Only version of the file will open in the Console Widget Viewer on the right.

- In the Console Widget Viewer, the user can view and print the record.
- Note that multiple attached files can be opened simultaneously in the Console Widget Viewer.
- When multiple files are opened in the Console Widget Viewer they can be printed individually or all together.

More information can be found in the Sage-PCNX Guide to Widgets,

<http://publichealth.lacounty.gov/sapc/docs/providers/sage/pcnx/PCNX-Guide-Widgets.pdf>

Appendix A

Standardized and appropriate naming of file attachments within Sage helps to organize documents. In addition, standardized naming of file attachments uploaded thru the Provider File Attach form helps users identify required documentation in the system later (e.g. file names appear in the Provider File Attach widget in their Client Dashboard view).

Providers are encouraged to use the following format to name files when uploading attachments into Sage-PCNX thru the Provider File Attach form:

- **Document Type-Date (MM-DD-YY)-Patient's First & Last Initial-PATID**

Standardized file naming examples:

- For Ester PCNX's ASAM Continuum
 - ASAM Continuum-03-15-24-EP-960919
- For Ester PCNX's CalOMS Admission
 - CalOMS-Admission-03-15-24-EP-960919
- For David PCNX's RBH Discharge
 - RBH Discharge-03-15-24-DP-910185
- For Greg Test's Problem List/Treatment Plan
 - PL-TP-01-15-24-GT-961048
- For Davis Alz's ROI for external providers
 - ROIExternal-04-20-24-DA-901162
- For Daniel PCNX's ROI for SAPC In-Network Providers
 - ROIInternal-01-13-24-DP-910185

Note:

- "Date (MM-DD-YY)" indicates when the document was COMPLETED, NOT the date the file attachment was uploaded.
- File names are limited to 150 characters, and the following characters are NOT allowable in the file name: ".:*?\\<>/|\"