



Substance Use Disorder Information System

## Sage User Onboarding / Offboarding and Privilege Management

Sage is LA County's substance use disorder (SUD) information system and is designed to enable network providers to perform important patient care and administrative functions.

The following document provides step-by-step instructions to manage Sage User accounts. Creating and managing Sage User accounts, involves three (3) unique processes:

PROCESS	WHAT IT DOES
1. Creating a C Number	This process requests a new C Number for new staff
2. Registering a C Number	This is the final step in the C Number creation, it confirms the information and establishes security questions.
3. Sage Account Registration	The final step establishes the user's account with Sage and grants the individual privileges based on their role within the organization.

### CONTENT

The scenarios described below are designed to assist providers with step-by-step instructions on how to manage the Sage user accounts:

- **Onboarding Sage Users**
  - Onboarding and Creating a New C Number
  - Onboarding a User with an Existing C Number
- **Reassigning a Sage User Account**
- **Managing a Sage User Privileges**
- **Multiple Agency Login**
- **Offboarding a Sage User Account**

# Sage User Onboarding / Offboarding and Privilege Management

Updated 12/08/17

Scenario	Process
<p><b>Onboarding a New User and Creating a New C Number</b> (Added 12/8/17)</p> <p><i>Example: A provider hires a new staff member that does not have a C Number or a Sage account.</i></p> <p><b>This process is for Sage users who do not have an existing C Number or Sage account. Users with no prior accounts, must go through all three (3) processes.</b></p>	<p><b><u>C NUMBER CREATION</u></b></p> <p>Request a C Number</p> <ul style="list-style-type: none"> <li>• Provider’s Liaison or New User submits a request for a C Number by following the instructions at the following link: <a href="http://dhs.lacounty.gov/cef">http://dhs.lacounty.gov/cef</a> <ol style="list-style-type: none"> <li>a. Click on “New Assignment”</li> <li>b. For Sponsor Facility select “Department of Public Health”</li> <li>c. For Sponsor Division select your agency</li> <li>d. For Sponsor Name select “Jorge Ortega”</li> <li>e. Enter Last Name</li> <li>f. Enter First Name</li> <li>g. Select Gender</li> <li>h. Enter your last four (4) social security numbers</li> <li>i. Enter your residence address</li> <li>j. Enter your residence city</li> <li>k. Enter your residence state</li> <li>l. Enter your residence zip code</li> <li>m. Enter date of birth</li> <li>n. Enter telephone number</li> <li>o. Enter your email address</li> <li>p. In the “Acknowledgment of form...” area you will need to first click the red highlighted words that reads “Click here to read”. Once you have done so the system will allow you to mark the box adjacent to “I have read this form...”.</li> <li>q. Click “Submit” when all is completed</li> </ol> </li> <li>• Once submitted, the Substance Abuse Prevention and Control (SAPC) will work with County partners to process the C Number request. This step includes contacting provider’s liaison and confirming request. Once request is validated and C Number is created, SAPC will notify requestor via email.</li> <li>• Email notification to providers will include instructions on how to proceed, specifically completing C Number Registration and Device Enrollment.</li> </ul> <p><b><u>C NUMBER REGISTRATION</u></b></p> <p>Upon confirmation and creation of a C Number, users will be directed to the following link to complete Steps 2 and 3: <a href="http://publichealth.lacounty.gov/sapc/Sage/Sageinfo.htm">http://publichealth.lacounty.gov/sapc/Sage/Sageinfo.htm</a></p> <ul style="list-style-type: none"> <li>• Click on “Set an initial password” This will allow users to create a permanent password.</li> </ul>

	<ul style="list-style-type: none"> <li>Click on “Enroll your C Number account” Here you will establish three (3) security questions to authenticate your C Number.</li> </ul> <p><b>SAGE REGISTRATION</b></p> <ul style="list-style-type: none"> <li>Provider will complete Sage ProviderConnect User Creation Form. The form is available at: <a href="http://publichealth.lacounty.gov/sapc/Sage/Sageinfo.htm">http://publichealth.lacounty.gov/sapc/Sage/Sageinfo.htm</a></li> <li>Once completed, provider will email form to <a href="mailto:sageforms@ph.lacounty.gov">sageforms@ph.lacounty.gov</a></li> <li>SAPC will verify the request form with provider’s liaison. Once validated, SAPC will work with Netsmart partners to create an account.</li> <li>Based on validated form, Netsmart will alert provider of mandatory training requirement(s) and provide training information.</li> <li>New User will attend required training(s).</li> <li>Once confirmation that user has concluded required training(s), Netsmart will create an account for user and notify the individual.</li> <li>User will log into system and confirm account information, including privileges.</li> </ul>
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Scenario	Process
<p><b>Onboarding a User with an Existing C Number</b></p> <p><i>Example: Provider is onboarding a staff who previously worked at another provider; provider is creating a Sage account for a staff who was previously issued a C Number.</i></p> <p><b>If the Sage User has an existing C Number, there is</b></p>	<p><b>SAGE REGISTRATION</b></p> <ul style="list-style-type: none"> <li>Provider will complete Sage ProviderConnect User Creation Form. The form is available at: <a href="http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm">http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm</a> <ul style="list-style-type: none"> <li>Under “Request Type”, please indicate this is a “Reassignment” and include the existing C Number.</li> <li>Once completed, provider will email form to <a href="mailto:sageforms@ph.lacounty.gov">sageforms@ph.lacounty.gov</a></li> <li>SAPC will verify the request form with provider’s liaison. Once validated, SAPC will work with Netsmart partners to create an account.</li> <li>Based on validated form, Netsmart will confirm if any additional training(s) are needed. If additional training is needed, Netsmart will alert provider of mandatory training requirement(s) and provide training information.</li> </ul> </li> </ul>

<p><b>no need to go through the C Number Creation Process. In this scenario, users go directly to Sage Registration.</b></p>	<ul style="list-style-type: none"> <li>• If needed, user will attend required training(s).</li> <li>• Once confirmation that user has concluded required training(s), if any, Netsmart will create an account for user and notify the individual.</li> <li>• User will log into system and confirm account information, including privileges.</li> </ul>
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Scenario	Process
<p><b>Reassigning a Sage User</b></p> <p><i>Example: An existing Sage User is changing employment from one SAPC network provider to another.</i></p> <p><b>If the Sage User has an existing C Number and Sage account, but is changing employers, there is no need to go through the C Number Creation Process. In this scenario, users go directly to Sage Registration.</b></p>	<p><b><u>SAGE REGISTRATION</u></b></p> <ul style="list-style-type: none"> <li>• Provider will complete Sage ProviderConnect User Creation Form. The form is available at: <a href="http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm">http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm</a></li> <li>• Under “Request Type”, please indicate this is a “Reassignment” and include the existing C Number.</li> <li>• Once completed, provider will email form to <a href="mailto:sageforms@ph.lacounty.gov">sageforms@ph.lacounty.gov</a></li> <li>• SAPC will verify the request form with the provider’s liaison. Once validated, SAPC will work with Netsmart partners to create an account.</li> <li>• Based on validated form, Netsmart will confirm if any additional training(s) are needed. If additional training(s) are needed, Netsmart will alert provider of mandatory training requirement(s) and provide training information.</li> <li>• If needed, user will attend required training(s).</li> <li>• Once confirmation that user has concluded required training(s), if any, Netsmart will create an account for user and notify the individual.</li> <li>• User will log into system and confirm account information, including privileges</li> </ul>

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Scenario	Process
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<p><b>Managing User Privileges</b></p> <p><i>Example: A provider wishes to modify the Sage accounts of their existing staff.</i></p> <p><b>In this scenario, no new accounts are being created. Instead, an existing account is being modify to either grant more or less privileges at that same organization. In this scenario, users can go directly to Sage Registration.</b></p>	<p><b><u>SAGE REGISTRATION</u></b></p> <ul style="list-style-type: none"> <li>• Provider will complete Sage ProviderConnect User Creation Form. The form is available at: <a href="http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm">http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm</a></li> <li>• Under “Request Type”, please indicate this is a “User Modification” and include the existing C Number.</li> <li>• Once completed, provider will email form to <a href="mailto:sageforms@ph.lacounty.gov">sageforms@ph.lacounty.gov</a></li> <li>• SAPC will verify the request form with provider’s liaison. Once validated, SAPC will work with Netsmart partners to create account.</li> <li>• Based on validated form, Netsmart will confirm if any additional training(s) are needed. If additional training(s) are needed, Netsmart will alert provider of mandatory training requirement(s) and provide training information.</li> <li>• If needed, user will attend required training(s).</li> <li>• Once confirmation that user has concluded required training(s), if any, Netsmart will create an account for user and notify the individual.</li> <li>• User will log into system and confirm account information, including privileges</li> </ul>
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<p><b>Multiple Agency User</b></p> <p><i>Example: A User is working at more than one organization that uses Sage.</i></p> <p><b>In this scenario, an existing account is being associated to multiple agencies. In this scenario, users can go directly to Sage Registration.</b></p>	<p><b><u>SAGE REGISTRATION</u></b></p> <ul style="list-style-type: none"> <li>• Provider will complete Sage ProviderConnect User Creation Form. The form is available at: <a href="http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm">http://publichealth.lacounty.gov/sapc/Sage/SageInfo.htm</a></li> <li>• Under “Request Type”, please indicate this is a “Additional Agency” and answer yes to the “Existing Agency Association”.</li> <li>• Once completed, provider will email form to <a href="mailto:sageforms@ph.lacounty.gov">sageforms@ph.lacounty.gov</a></li> <li>• SAPC will verify the request form with provider’s liaison. Once validated, SAPC will work with Netsmart partners to create account.</li> <li>• Based on validated form, Netsmart will confirm if any additional training(s) are needed. If additional training(s) are needed, Netsmart will alert provider of mandatory training requirement(s) and provide training information.</li> <li>• If needed, user will attend required training(s).</li> <li>• Once confirmation that user has concluded required training(s), if any, Netsmart will create an account for user and notify the individual.</li> </ul>
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	<ul style="list-style-type: none"> <li>User will log into system and confirm account information, including agency affiliation.</li> </ul>
Scenario	Process
<p><b>Offboarding a Sage User</b></p> <p><i>Example: A provider is no longer associated with a Sage User.</i></p> <p><b>In this scenario, an account is being terminated. Providers can terminate a Sage account by completing the Sage Registration form.</b></p>	<p><b><u>SAGE REGISTRATION</u></b></p> <ul style="list-style-type: none"> <li>Provider will complete Sage ProviderConnect User Creation Form. The form is available at <a href="http://publichealth.lacounty.gov/sapc/Sage/Sageinfo.htm">http://publichealth.lacounty.gov/sapc/Sage/Sageinfo.htm</a></li> <li>Under “Request Type”, please indicate this is a “User Termination” and include the existing C Number.</li> <li>Once completed, provider will email form to <a href="mailto:sageforms@ph.lacounty.gov">sageforms@ph.lacounty.gov</a></li> <li>SAPC will verify the request form with provider’s liaison. Once validated, SAPC will work with Netsmart partners to terminate the account.</li> <li>The provider and user will receive an email confirming the user’s termination</li> </ul>