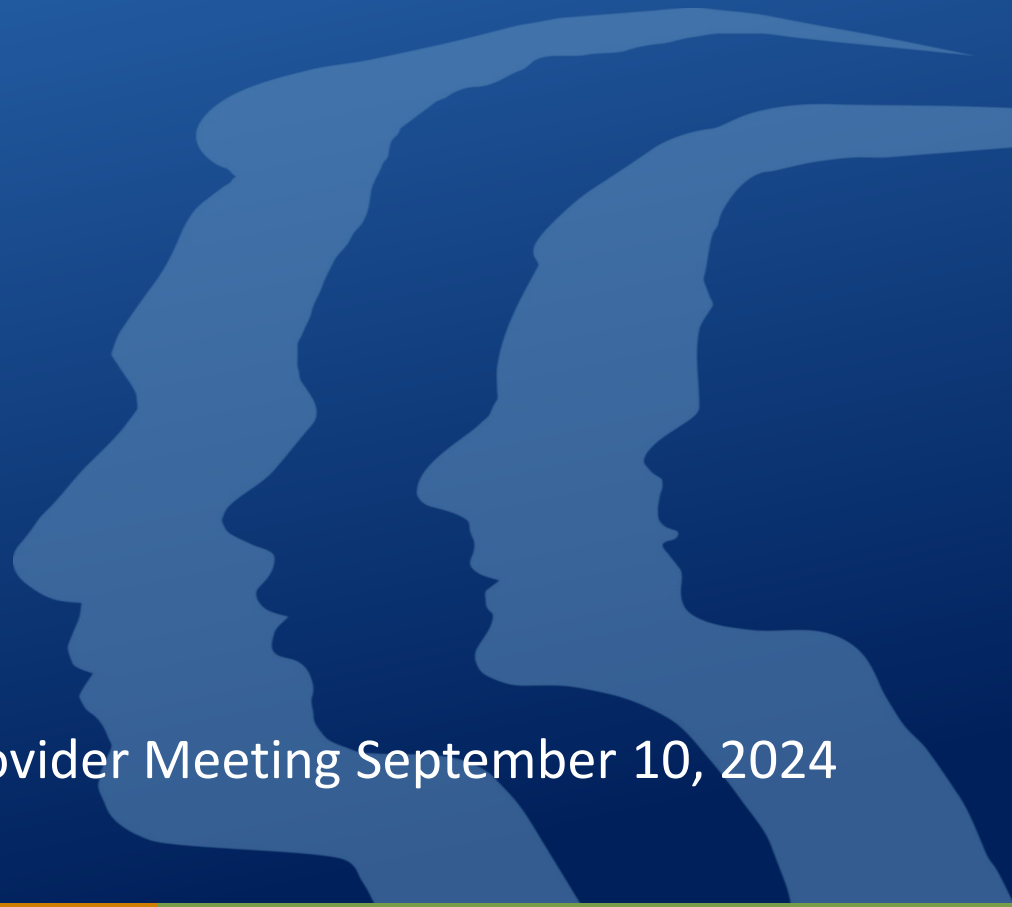
SAGE UPDATES



Los Angeles County Department of Public Health

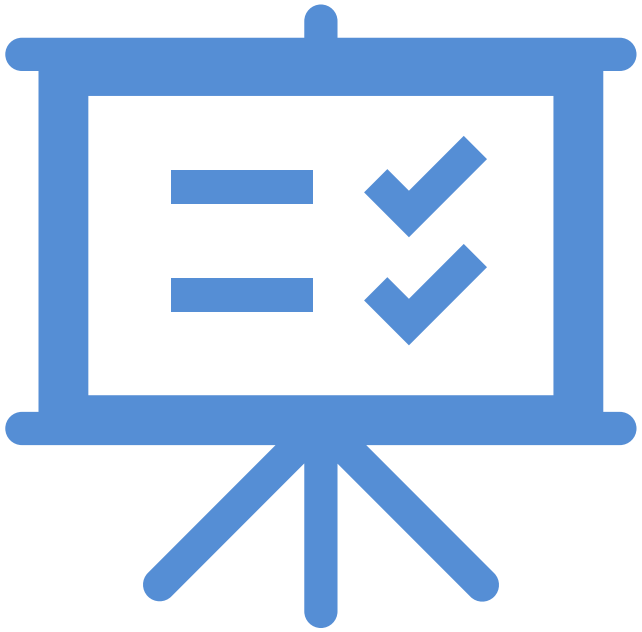
Substance Abuse Prevention & Control

All Provider Meeting September 10, 2024

Overview

Document Routing and Appending

Exciting Updates Coming Soon



Document Routing

& Appending Documentation

Document Routing Updates

Enables forms to be routed for supervisor approval.

All forms enabled for Doc Routing are also enabled for Appending.

- **Discharge and Transfer Form**
- **Drug Testing**
- **Patient Medications**
- **Problem List/Treatment Plan**
- **Progress Note**
- **Recovery Bridge Housing Discharge**
- **Referral Connections**
- **Service Connections Log**
- **Youth and Young Adult Screener**

Progress Notes Status Report and Documents Requiring Co-Signature Reports/Widgets will be updated with document routing for implementation.

Updated job aid and recorded training will be posted to the SAPC website for implementation.

Updated Reports and Widgets for Document Routing

Progress Note Status Report

- **Updated to include:**
  - **Document routing status for pending and finalized documents.**
  - **Finalized date of Finalizer signature for signed documents.**

Documents Requiring Co-Signature

- **Updated to include forms that have been finalized by the author but are pending signature from Supervisor/Approver via document routing.**
  - **Authors can finalize the document and route for signature, but the document status remains pending until all approvers accept and sign.**
  - **Ready for Review check box is not required to route the document for signature.**
  - **The report will continue to show documents where Ready for Review is checked and the document is left in draft.**

Key Points for Document Routing

Author can view, read and double check the note prior to finalizing and routing.

Immediately notifies the user(s) routed for signature via pop-up message if logged into Sage or next time user logs in.

Instantly populates to the user(s) My To Do's widget under the "Documents to Sign" column.

Supervisor/Approver can view the full note/form, accept/reject and sign or comment from the My To Do's widget for all notes and forms sent to that user for signature.

SAPC recommends ONLY using the Supervisor name field and sending to ONLY one user when routing unless form needs multiple approvers

Form will remain pending until ALL approvers have accepted and signed.

Each Supervisor/Approver **MUST ACCEPT and SIGN** the document for it to be final.

- Forms that are 'signed' without accepting will remain pending on the widget and in the system.

What is the Append Function?

- Allows original author and supervisors to add official entries to the medical record without editing/modifying the original note in free text format.
- Only available on forms that have been Document Routing enabled.
- Forms include: Discharge and Transfer form, Drug Testing, Patient Medications, Problem List/Treatment Plan, Progress Note, Recovery Bridge Housing Discharge, Referral Connections, Service Connections Log, Youth and Young Adult Screener

Important Caveats to Appending

Appending does not edit the original document

- Appending allows the user to update the content of clinical documentation easily without the need for a helpdesk ticket.
- The original document remains intact and finalized.
- The appended comments will display on the All Doc/Chart view in PCNX and the Client Dashboard widgets connected to a Console Widget Viewer.

Appended data does not populate to any reports that display the appended forms.

- If fields on the form need to be corrected that populate to reports and/or impact billing, a medical record modification request should still be submitted to the helpdesk.
  - e.g. Progress Note Status report used for billing will not reflect any information in the appended note section.
  - Fields not related to billing or reporting needs, could be updated by appending the note.

The appended note will be added to the bottom of the document and part of the official record.

Date Appended: 04/10/2024 at 1147 PDT
Form Name: Progress Note
Client's Name: TEST,QIUM (000159908)
Client's DOB: 10/21/2005

COUNTY OF LOS ANGELES SAPC
1000 S FREMONT AVE
Alhambra, CA 91803

Testing append function.

----------ADDITIONAL NOTE----------

Electronically Signed by: GREG SAPC SCHWARZ Psy.D (Lic. Psychologist) on 04/10/2024 at 1147 PDT Appended Author

Suggested Uses for Appending

Correcting or adding info to the content or narrative of clinical documents

Correcting errors to fields that are not used for billing

Number of members in a group corrections (as this no longer required on a claim)

Coming Soon to Sage

Real Time Inquiry 270 Request and 271 Results

New fields will be added to the Real Time Inquiry 270 Request form to display the 271 results directly on the form.

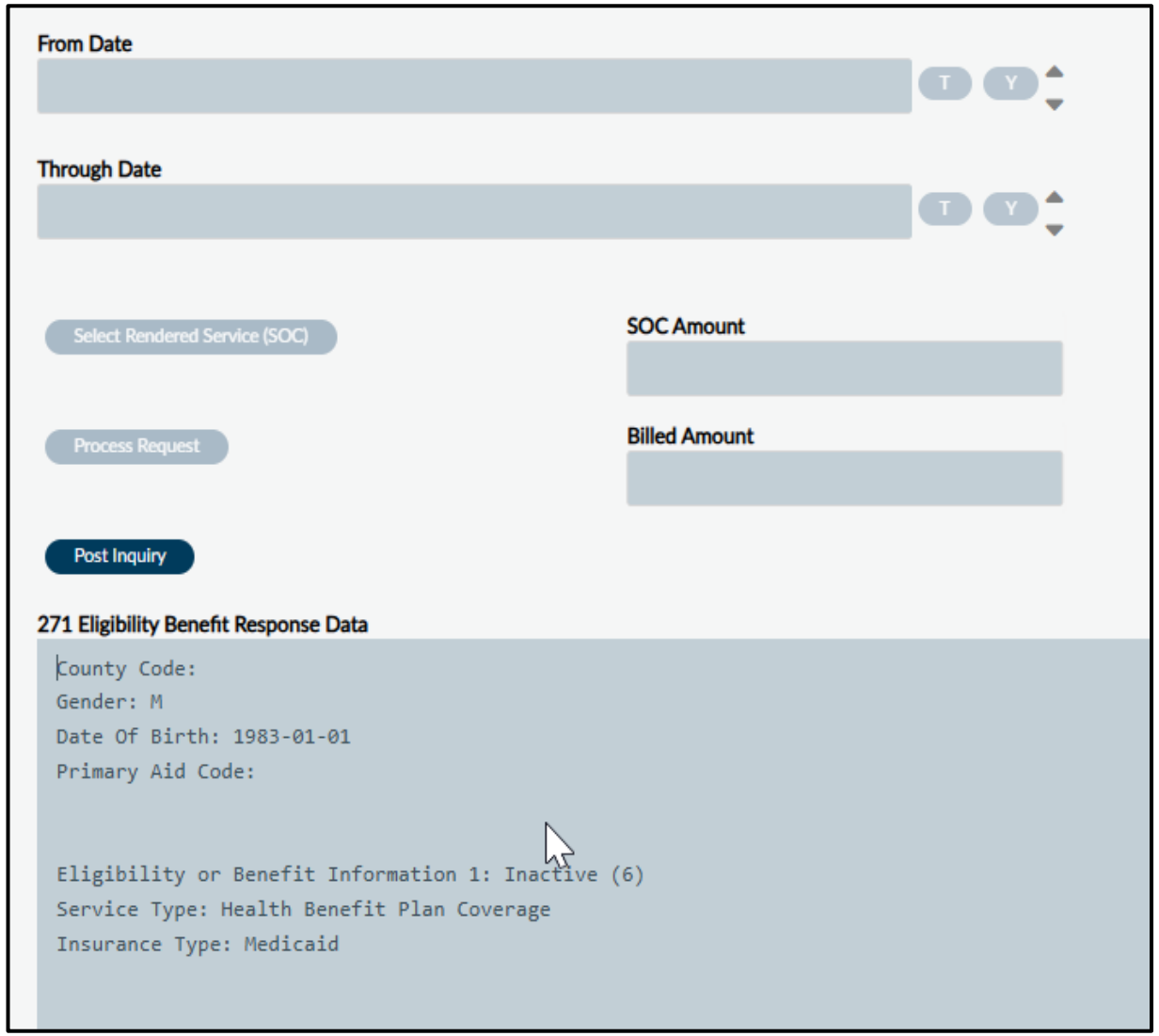
These new fields include:

- **County of Responsibility Code**
- **Primary AID Code**
- **Secondary AID Code**
- **Gender- from the 271 results, not data from Sage forms**
- **Date of Birth- from the 271 results, not data from Sage forms**
- **OHC Plan Name**
- **Eligibility or Benefit Information**
- **Service Type**
- **Insurance Type**
- **Share of Cost**

271 transactions do not include county of residence as defined by the X12 standard and are not transmitted from DHCS.

Once SAPC validates the added functionality, SAPC will release the updates with updated job aids to the website.

Sample of 271 Results



Date of Birth: 1970-08-08
Gender: F
County Code: 19
Primary Aid Code: 60
Secondary Aid Code: 70

Eligibility or Benefit Information Code: Active Coverage (1)
Service Type: Mental Health (MH)
Insurance Type: Medicaid (MC)

Eligibility or Benefit Information Code: Deductible (C)
Service Type: Mental Health (MH)
Insurance Type: Medicaid (MC)
Benefit Amount: 100

Eligibility or Benefit Information Code: Other or Additional Payor (R)
Service Type: Mental Health (MH)
Insurance Type: Medicare Part A (MA)
OHC Plan Name: Humana Medicare Advantage

Void Claim Assignment and Replacement Claims in PCNX

Replacement claim functionality is being validated by SAPC to be added to PCNX, which will allow Primary Sage Users to replace claims.

- This will reduce similar claims and duplicate rows on various reports when utilized accordingly.
- SAPC Finance is validating and creating various resources to aid in the implementation of this added functionality.

Void Claim Assignment: Performing Provider option

- At the request of many of our providers, the Performing Provider is being added to the Void Claim Assignment form to assist in filtering out similar claims to be voided.

Timelines for New Features Implementation

Document Routing and Append Features

Anticipated Oct 2024

Real Time Inquiry 270 Request Updates

Anticipated Oct 2024

Void Claim Assignment Update and Replacement Claim Assignment Function

Anticipated before December 2024

CST Training Highlights

County of Los Angeles Public Health

Name of Training	Date & Time	Link to flyer for registration
Developing a Plan of Care for Substance Use Providers: CalAIM Requirements and Best Practices	Wednesday 9/11/24 8:30am-12:30pm	Flyer
Connecting Clinical Documentation to CPT and HCPCS Medi-Cal Codes	Thursday 9/12/24 9:00am-11:45am	Flyer
Substance Use Treatment with Justice Involved Populations	Wednesday 9/17/24 9:00am-12:15pm	Flyer
Re-Imagining Harm Reduction for Substance Use Treatment	Thursday 9/19/24 1:00pm-3:45pm	Flyer
Foundational Principles of Ethical and Confidential Practice in Substance Use Tx.	Wednesday 9/25/24 9:00am-4:30pm	Flyer
Clinical Documentation for Substance Use Treatment Providers: CalAIM Requirements and Best Practices	Tuesday 10/01/24 8:30am-12:30pm	Flyer
Engagement & Assessment of Individuals with Co-occurring Mental Health and Substance Use Conditions	Thursday 10/08/24 9:00am-12:15pm	Flyer
LPHA Series: What LPHAs Need to Know About the ASAM CONTINUUM	Friday 10/18/24 8:30am-12:30pm	Flyer

For a list of more trainings available and the SAPC Training Calendar please visit or scan QR Code:
LA County Department of Public Health - Substance Abuse Prevention and Control - SAPC Trainings