



# Understanding the Sage Alerts

Substance Abuse Prevention and Control  
County of Los Angeles Department of Public Health



Sage Provider Advisory Meeting: November 27, 2018





## Sage Alerts

- **Purpose:** The Sage system has a set of alerts to assist providers in identifying key deadlines or requirements to aid in clinical service delivery, authorization/re-authorization submission, and data components outlined in the provider manual.
- **Goals:**
  1. Describe how to access Alerts in Sage
  2. Identify documentation elements required to ensure proper Alert functionality.
  3. Describe how each alert functions and populates results.
  4. Showcase potential benefits to provider workflow and operations of each alert



# Sage Alerts

## How to Access Sage Alerts report

- On Main Menu, Select the newly created “Alerts” option
- This will automatically run the Alerts for all available filters

Main Menu - Provider		
<b>Billing</b>	<b>Lookup Client</b>	<b>Provider</b>
<b>Reports</b>	<b>Add New Client/Client Search</b>	<b>Change Password</b>
<b>Documentation</b>	<b>News</b>	<b>Alerts</b>
<b>Logout / Exit</b>		

- To narrow down the report, select and deselect any unnecessary item and the report will automatically reconfigure to the selected items.

Filter Alert Types			
<b>Deselect All</b>	<input checked="" type="checkbox"/> Service Standard Alert	<input checked="" type="checkbox"/> At-Risk Maximum Alert	<input checked="" type="checkbox"/> 30-Day Inactivity Alert
<input checked="" type="checkbox"/> 7 Day Cal-OMS Submission Alert	<input checked="" type="checkbox"/> 30-Day Cal-OMS Submission Alert	<input checked="" type="checkbox"/> DMC Eligibility Period Expiration Alert	<input checked="" type="checkbox"/> 7-Day Reauthorization Alert

Service Standard Alert				
Patient Name(ID)	Alert Period	Level of Care	Service Code Category	Alert Message
RBH Test (143036)	Month of 6/2018	ASAM 1.0	Case Management	SERVICE STANDARD ALERT - Please note that services provided to this patient in their current level of care are projected to fall outside of the required service standard minimums OR maximums. Providers must ensure that service standard minimums OR maximums are met, or should transition care to a more appropriate level of care.
RBH Test (143036)	Month of 7/2018	ASAM 1.0	Case Management	SERVICE STANDARD ALERT - Please note that services provided to this patient in their current level of care are projected to fall outside of the required service standard minimums OR maximums. Providers must ensure that service standard minimums OR maximums are met, or should transition care to a more appropriate level of care.



## Sage Alerts: Important Prerequisites

- In order to take full advantage of the Alerts functionality, the following documentation is required to be entered into each patient's chart in Sage:
  - ✓ Provider Admission/Episode
  - ✓ Cal-OMS Admission
  - ✓ Approved Service Authorization
  - ✓ Current Eligibility Verification
- Data for all included Alerts will be refreshed each night by an automatic process
  - The alert will continue to show until the following day after the automated refresh has run.
    - As a result, if you address the issue in the alert, you may not see resolution until after the refresh occurs.
  - If alert is still pertinent, it will continue to display after refresh.



## Sage Alerts

Alert	Alert Message	Translation
Service Standard Alert	<i>SERVICE STANDARD ALERT - Please note that services provided to this patient in their current level of care are projected to fall outside of the required service standard minimums OR maximums. Providers must ensure that service standard minimums OR maximums are met, or should transition care to a more appropriate level of care.</i>	Alerts providers when clinical service hours for the patient in a given period depending on the LOC, fall outside the minimum or maximums set by SAPC. Example <ul style="list-style-type: none"><li>• 0-9 hours/month for ASAM 1.0</li><li>• 20+ hours/week for residential. See rates and standards matrix for complete listing of service standards.</li></ul>
At-Risk Maximum Alert	<i>AT-RISK MAXIMUM ALERT - The service maximum for this service has been met and reimbursable services cannot be exceeded. Services for at-risk youth and young adults age 12-20 have a service maximum of no more than 8 units of intake services per 60 days, and no more than 16 units of all direct services per 60 days.</i>	Alerts ONLY providers working with ASAM 1.0AR population when claims exceed set standards per service/H CPC code for ASAM 1.0AR.
30 Day Inactivity Alert	<i>INACTIVITY ALERT - There has been no activity for this patient for the past 30 days. Patients must be administratively discharged if there has been no activity in their record for more than 45 days. Please either administratively discharge this patient if inactive, or record activity.</i>	Alerts providers when there is no clinical documentation activity in Sage for a given patient for the past 30 days. And reminds to either enter activity or discharge if no contact with patient after 45 days.



## Sage Alerts

Alert	Alert Message	Translation
7-Day Cal-OMS Submission Alert	<i>7 DAY DATA SUBMISSION ALERT - Data for this patient has not been entered within the required timeframe of admission. Providers must submit a limited set of admission data (see highlighted data fields) within 7 days of admission. Please enter this information immediately.</i>	<i>Alerts provider when minimum required data in the Cal-OMS admission has not been entered within 7 days of the admission date. At minimum, providers are required to enter certain required fields on the Cal-OMS within 7 days. The specific requirements are available on the Cal-OMS admission form above the form itself in the show/hide message button. GS1</i>
30 Day Cal-OMS Submission Alert	<i>30 DAY DATA SUBMISSION ALERT - Data for this patient has not been entered within the required timeframe of admission. Providers must submit full admission data within 30 days of admission. Please enter this information immediately.</i>	<i>Alerts provider when a Cal-OMS admission has not been completed or entered at all within 30 days of the admission date. This is a state requirement. Providers need to submit a helpdesk ticket if unable to enter Cal-OMS data.</i>
DMC Eligibility Period Expiration Alert	<i>DMC ELIGIBILITY PERIOD EXPIRATION ALERT - Patient's DMC eligibility is expiring in 30 calendar days. Please check and submit for necessary re-verification of DMC eligibility.</i>	<i>Alerts providers when ELIGIBILITY VERIFICATION is going to expire within 30 calendar days. However, It is not only for DMC patients. This is the SAPC eligibility verification period for both DMC and Non-DMC patients, and does not refer to the patient's DMC financial eligibility. It refers to eligibility within the SAPC network under the DMC waiver.</i>



## Sage Alerts

<b>Alert</b>	<b><i>Alert Message</i></b>	<b><i>Translation</i></b>
7 Day Reauthorization Alert	REAUTHORIZATION ALERT - Patient's initial authorization for this service is expiring in 7 days. If a reauthorization is needed, providers need to submit their reauthorization request for this service at least 7 days before the expiration of the initial authorization.	Alerts provider when the current service authorization is set to expire within 7 days. You must submit a reauthorization request if the patient remains in treatment. Reminder that requests for reauthorization of ASAM 1.0, 2.1 and RSS need to be submitted at least 21 days in advance.





## Sage Alerts: Service Standard Alert

This alert contains multiple levels of detail to best serve all your quality assurance needs:

- This alert notifies you when a patient has not met the minimum or maximum number of service hours for their LOC,
- This alert is based on treatments entered, regardless if they have been submitted to SAPC.
- Covers date ranges throughout each patient's course of treatment and alerts for any period that is out of bounds.
- All levels of care for your agency are in the same alert screen
- All services offered on the same alert screen
- Need to cross reference with Rates and Standards Matrix
  - For example, 9-19 service hour range for Intensive Outpatient
    - Alert will trigger if either minimum of 9 hours/week not met or over 19 hours exceeded

Alert Period	Level of Care	Service Code Category	
Month of 10/2018	ASAM 3.1	Case Management	SERVICE STANDARD ALERT - must ensure that service standar
Month of 11/2018	ASAM 3.1	Case Management	SERVICE STANDARD ALERT - must ensure that service standar
Week of 10/21/2018	ASAM 3.1	Combined Services	SERVICE STANDARD ALERT - must ensure that service standar
Week of 10/28/2018	ASAM 3.1	Combined Services	SERVICE STANDARD ALERT - must ensure that service standar



## Sage Alerts: Cal-OMS 7 and 30 Day Submission Alert

These alerts provide lists of patients at the agency level who have missing CalOMS admission data at 7 (minimum data set) or 30 days (complete data set) after admission.

- Includes current and prior patients, triggers at 7 and 30 days after admission.
- 7 day alert will eventually become a 30 day alert if not addressed, drop off the 7 day alert list, but show on the 30 day alert list
- Once the completed CalOMS admission data is entered, patients will fall off this list.
- All levels of care for your agency on the same alert screen.
- Providers who treat patients aged 12-17 have 14 days for the minimum data. This alert is not configured for this rule. However can still be used as an alert of an upcoming deadline.

Level of Care Admitted	Cal-OMS Admission Date	
Residential-3.1 (Clinically Managed Low	04/18/2018	30 DAY DATA SUBMISSION ALERT - admission. Please enter this informatio
Residential-3.1 (Clinically Managed Low	11/30/2017	30 DAY DATA SUBMISSION ALERT - admission. Please enter this informatio
Outpatient Services	02/02/2018	30 DAY DATA SUBMISSION ALERT - admission. Please enter this informatio



## Sage Alerts: 30-Day Inactivity Alert

This alert notifies you when there has not been activity in Sage for 30 days.

Criteria

“Last Activity Date” = last date that *data was entered and saved into the clinical documentation portions of Sage when there is no CalOMS discharge submitted*;

This alert defines activity as: Avatar Episode Admission or Discharge, Cal-OMS Admission or Discharge, ASAM Assessment, Treatment Plan Form, Progress Note Forms and/or Miscellaneous Notes

Providers should verify the last activity date is after actual last date of service.

If date of service is beyond the last activity date shown on alert, then there is missing Documentation from the list above.

Can also be used to identify prior clients who do not have a CalOMS discharge.

30-Day Inactivity Alert	
Last Activity Date	Alert Message
10/09/2018	INACTIVITY ALERT - There has been no activity for this patient for the past 30 days. Patients must be administratively discharged administratively discharge this patient if inactive, or record activity.
06/14/2018	INACTIVITY ALERT - There has been no activity for this patient for the past 30 days. Patients must be administratively discharged administratively discharge this patient if inactive, or record activity.



## Sage Alerts: 7-Day Reauthorization Alert

This alert notifies you when your authorization is set to expire within the next 7 days.

Criteria:

- You **MUST** have a CalOMS admission for this report to work.
- If the authorization is already expired or is more than 7 days from expiring, you will not see this alert.
- This alert only lists the name and authorization number, as the end date of the authorization will always be within 7 days of the alerts run date.
  - Ex: Running the Alert today will provide all authorizations ending from 11/27/18 to 12/03/18.
- Providers will need to run the [Authorization Status Report](#) to identify Authorizations that are ending outside of this time period or have already expired.
  - For best results on the Authorization Status Report, search all active authorizations for the fiscal year and sort by end date on the results page.

7-Day Reauthorization Alert		
Patient Name(ID)	Authorization Number	Alert Message
		REAUTHORIZATION ALERT - Patient's initial authorization for this service is expiring in 7 days. service at least 7 days before the expiration of the initial authorization.





## Sage Alerts: DMC Eligibility Period Expiration Alert

This alert notifies providers of patients whose Eligibility Verification Period (6 months for Non-OTP and 1 year for OTP) is within 30 days of expiration.

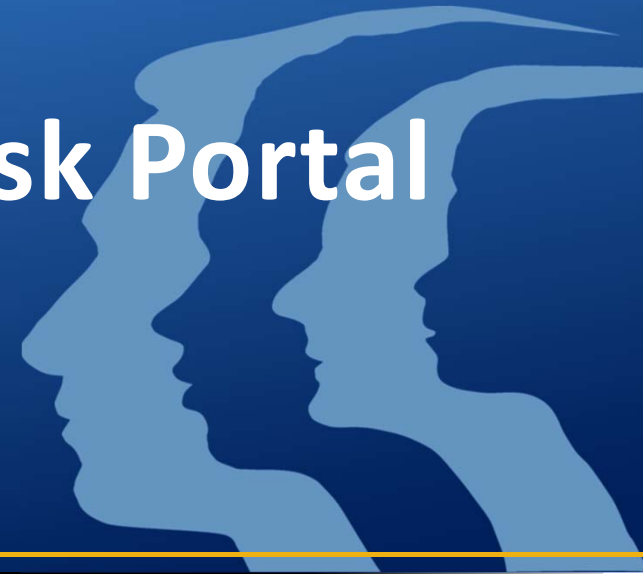
- This is for all SAPC patients, DMC or Non-DMC services
  - Refers to SAPC eligibility for any service under DMC waiver, not referring to DMC guarantor
- Runs for all patients active eligibility verifications ending within 30 days of the run date.
  - OTP and Non-OTP on the same alert screen.

DMC Eligibility Period Expiration Alert		
Level of Care	Verification Date	Alert Message
Non-OTP Services	06/14/2018	DMC ELIGIBILITY PERIOD EXPIRATION ALERT - Patient's DMC eligibility is expiring in 30 days of DMC eligibility.
OTP Services	12/01/2017	DMC ELIGIBILITY PERIOD EXPIRATION ALERT - Patient's DMC eligibility is expiring in 30 days of DMC eligibility.
Non-OTP Services	06/12/2018	DMC ELIGIBILITY PERIOD EXPIRATION ALERT - Patient's DMC eligibility is expiring in 30 days of DMC eligibility.



# Using the Online Helpdesk Portal

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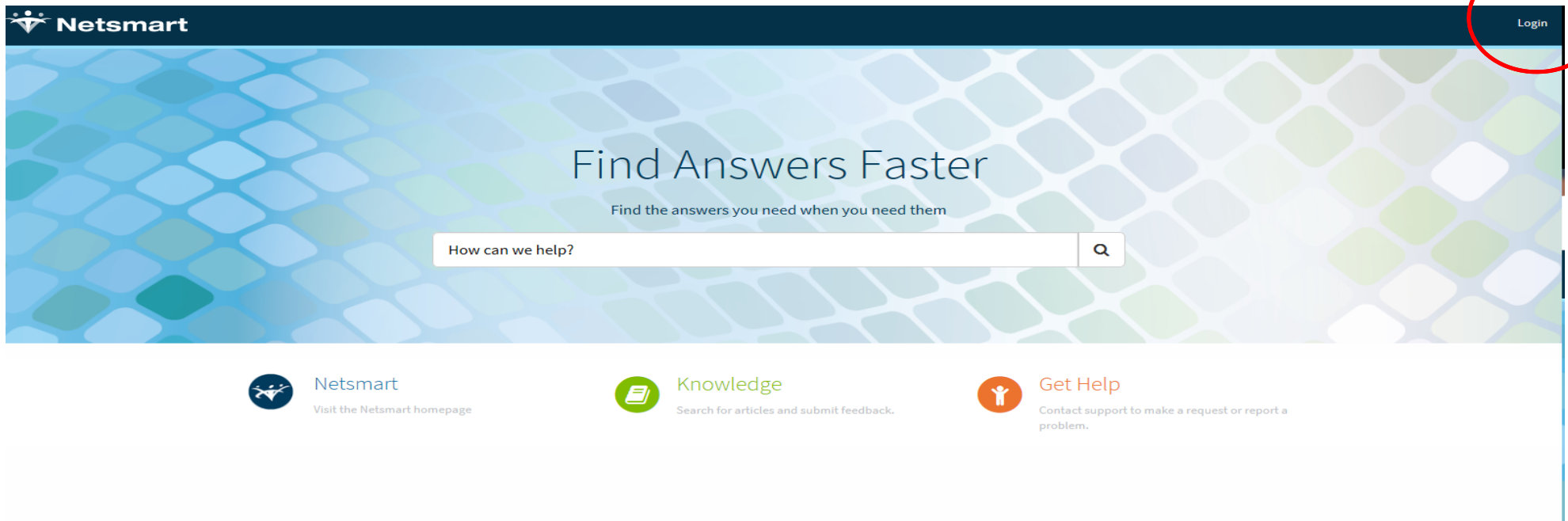


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## Submitting Helpdesk Tickets and Enhancement Requests Online: Sage Online Portal

- <https://netsmart.service-now.com/plexussupport>
- Click on “Login” to login for the first time or for returning visits.
- Click “Create Case” after logging in to complete form submit to online helpdesk.





**Netsmart** Login


### Find Answers Faster

Find the answers you need when you need them

How can we help?

 **Netsmart**  
Visit the Netsmart homepage

 **Knowledge**  
Search for articles and submit feedback.

 **Get Help**  
Contact support to make a request or report a problem.





<http://publichealth.lacounty.gov/sapc/Sage/Training/SageHelpDeskHowToCreateACaseOnline.mp4>

The screenshot shows the Netsmart Sage Helpdesk Portal. At the top left is the Netsmart logo. To its right, the text reads "Sage Helpdesk Portal" and "https://netsmart.service-now.com/plexussupport". In the top right corner, there is a "Login" link. The main content area has a blue and green geometric pattern background. It features the heading "Find Answers Faster" and the subtext "Find the answers you need when you need them". Below this is a search bar with the placeholder text "How can we help?" and a search icon. At the bottom, there are three navigation options: "Netsmart" with a subtext "Visit the Netsmart homepage", "Knowledge" with a subtext "Search for articles and submit feedback.", and "Get Help" with a subtext "Contact support to make a request or report a problem."



## Submitting Helpdesk Tickets and Enhancement Requests: Sage Online Portal

1. Ensure your name is correct.
  - a. The email address associated with your Sage account will be used to notify you when updates/comments are made to your case.
  - b. You will receive a message from the assigned Level 1 technician within 1 hour of submission
    - i. If you have Immediate needs, contacting the helpdesk via the telephone process is recommended
2. Product should be "ProviderConnect Support"
3. Asset relates to the specific form or process you need help with
  - a. Select "Enhancement" if you are submitting an Enhancement Request, not the form you wish to enhance.
4. Enter Short Description and as much information as you can in the Additional Details
5. Select your agency from the "Where are you located" Dropdown
6. Select the appropriate radio buttons for how many people are affected and how much the issue is impacting your ability to work
7. Screenshots and other attachments assist the technician diagnose the problem.
  - a. Attachments are encrypted as soon as they are uploaded to ensure HIPAA compliance
8. Click the Submit Button before exiting the page