Sage Access Group Descriptions

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. Based on the duties of staff, providers should identify what access or privileges each staff should have. Depending on the organizational structure and workflows at provider agencies, some provider staff may need to have access to multiple functionalities within Sage.

Though we may think of a user's function in Sage as a role, a more accurate way of approaching this is to consider what access to the different functionalities of Sage each staff member should have. This access should be based on the staff's duties, clinical functions, role in the organization and level of responsibility within the organization's structure.

The following descriptions are designed to provide clarity on access groups and their privileges to assist providers in determining what access staff should have within Sage.

When requesting User Access to Sage, providers will be asked to identify ONE "Access Group" for the staff member they are requesting access for. If the Access Group includes Clinical responsibilities because the user is expected to perform clinical functions, providers will be asked to add additional information to further define "Practitioner" type (e.g., LPHA type), including the following:

1. **NPI number** (required for any clinical providing billable services)
2. **Registration Date**
3. **Practitioner Category** (Counselor and LPHA distinctions)
4. **Discipline** (Type of certification or license)

Providers should only request staff access for access groups for which they are qualified to access and perform functions in. For example, counselors, licensed-eligible LPHAs or student/intern staff SHOULD NOT be placed in LPHA access groups regardless of their administrative positions or responsibilities.

This document includes an overview of the following Access Groups:

(1)	Clinical Only – LPHA	(8)	LVN & MA
(2)	Clinical Only – Counselor	(9)	Student / Intern
(3)	Clinical Only – License-Eligible LPHA	(10)	Audit User
(4)	Financial Only	(11)	Operations
(5)	Financial + Clinical – LPHA	(12)	Clerical
(6)	Financial + Clinical – Counselor	(13)	Clinical Visible Only – No Login
(7)	Financial + Clinical License-Eligible LPHA	(14)	Certified Peer Support Specialist
		(15)	Financial + Certified Peer Support Specialist

Access Group	DESCRIPTION
	Access Group defines functional access within Sage. Within many Sage forms, particularly clinical forms, there is 'behind-the-scenes' logic that allows the system to automate certain functionalities (e.g., who is authorized to create a Draft of a form and who is able complete certain clinical forms as "Final"). Selecting the appropriate Access Group is required to ensure that provider staff have access to necessary functions within Sage based on their duties, clinical functions, and role and level of responsibility within their provider organization.

(1) Clinical Only – LPHA	This access group is exclusively for Licensed Professionals of the Healing Arts (LPHA) and licensed-eligible LPHA's, as defined by SAPC's Provider Manual for Substance Use Disorder Treatment Services. Among other things, LPHA's and licensed-eligible LPHA's can establish medical necessity by signing off on ASAM assessments and are required to approve treatment plans.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. Enter Cal-OMS data
	3. Create a Cal-OMS Admission and Discharge
	4. Perform Cal-OMS Annual Updates
	5. Create a Service Authorization
	6. Complete Provider Diagnosis (ICD-10) Form
	7. Update Other Health Coverage Form
	8. View Clinical Contact
	9. Create both a *Draft* version as well as *Finalize* the following Sage Clinical Forms:
	  a. Progress Notes (All versions)
	  b. Drug Testing
	  c. Miscellaneous Note Options
	  d. Patient Medications
	  e. Discharge and Transfer Form
	  f. Recovery Bridge Housing Discharge
	  g. Provider Adverse Event Reporting
	  h. Provider Complaints/Grievances
	  i. Provider Reportable Incidents
	  j. Provider Appeal Submission
	  k. Treatment Plans
	  l. ASAM Assessment

(2) Clinical Only – Counselor	This is intended for certified or registered counselors. This access group allows these counseling staff to conduct standard treatment services including, group counseling, individual session, treatment plans and the documentation of those services.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. Enter Cal-OMS data
	3. Create a Cal-OMS Admission and Discharge
	4. Perform Cal-OMS Annual Updates
	5. Create a Service Authorization
	6. Complete Provider Diagnosis (ICD-10) Form (note: should only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's)
	7. Update Other Health Coverage Form
	8. View Clinical Contact
	9. Create *Draft* version as well as *Finalize* most Sage Clinical Forms, unless indicated otherwise:
	   a. Progress Notes (All versions)
	   b. Drug Testing
	   c. Miscellaneous Note Options
	   d. Patient Medications
	   e. Discharge and Transfer Form
	   f. Recovery Bridge Housing Discharge
	   g. Provider Adverse Event Reporting
	   h. Provider Complaints/Grievances
	   i. Provider Reportable Incidents
	   j. Provider Appeal Submission
	   k. Treatment Plans* (can only access DRAFT functionality)
	   l. ASAM Assessment* (can only access DRAFT functionality)

	This access group is exclusively for Licensed Professionals of the Healing Arts (LPHA) and licensed-eligible LPHA's, as defined by SAPC's Provider Manual for Substance Use Disorder Treatment Services. Among other things, LPHA's and licensed-eligible LPHA's can establish medical necessity by signing off on ASAM assessments and are required to approve treatment plans.
(3) Clinical Only – Licensed Eligible LPHA	At a high-level, users with this Access Group can:

1. Admit a client
2. Enter Cal-OMS data
3. Create a Cal-OMS Admission and Discharge
4. Perform Cal-OMS Annual Updates
5. Create a Service Authorization
6. Complete Provider Diagnosis (ICD-10) Form
7. Update Other Health Coverage Form
8. View Clinical Contact
9. Create <u>both</u> a *Draft* version as well as *Finalize* the following Sage Clinical Forms:
    a. Progress Notes (All versions)
    b. Drug Testing
    c. Miscellaneous Note Options
    d. Patient Medications
    e. Discharge and Transfer Form
    f. Recovery Bridge Housing Discharge
    g. Provider Adverse Event Reporting
    h. Provider Complaints/Grievances
    i. Provider Reportable Incidents
    j. Provider Appeal Submission
    k. Treatment Plans
    l. ASAM Assessment

(4) Financial Only	This access group is designed for staff who deal with the organization's finances, specifically those staff who will submit billing claims for treatment services eligible for reimbursement from the County. At a high-level, users with this Access Group can: 1. Enter Cal-OMS data 2. Create a Cal-OMS Admission and Discharge 3. Perform Cal-OMS Annual Updates 4. Perform claim (billing) to the County 5. Access financial reports 6. Update Other Health Coverage Form 7. View Authorizations 8. View Provider Diagnosis (ICD-10) 9. View ASAM Assessment 10. View Women's Health History 11. View Client Eligibility Verification Report 12. View Demographic 13. View Treatment Plan Worklist Report 14. View Clinical Contact 15. View Discharge and Transfer Assessment/Form 16. View Drug Testing 17. View Miscellaneous Note Options 18. View Patient Medications 19. View Progress Note (BIRP) 20. View Progress Note (GIRP) 21. View Progress Note (SIRP) 22. View Progress Note (SOAP) 23. View/Edit/Finalize Provider Appeals Submission 24. View Provider No Show Log 25. View Recovery Bridge Housing Discharge 26. View Treatment Plan

(5) Financial + Clinical – LPHA	Some LPHA's and licensed-eligible LPHA's also submit billing claims or are involved in financial matters. This access group is intended for such staff and includes the most comprehensive amount of permissions.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. Enter Cal-OMS data
	3. Create a Cal-OMS Admission and Discharge
	4. Perform Cal-OMS Annual Updates
	5. Create a Service Authorization
	6. Complete Provider Diagnosis (ICD-10) Form
	7. Update Other Health Coverage Form
	8. View Clinical Contact
	9. Create both a *Draft* version as well as *Finalize* the following Sage Clinical Forms:
	   a. Progress Notes (All versions)
	   b. Drug Testing
	   c. Miscellaneous Note Options
	   d. Patient Medications
	   e. Discharge and Transfer Form
	   f. Recovery Bridge Housing Discharge
	   g. Provider Adverse Event Reporting
	   h. Provider Complaints/Grievances
	   i. Provider Reportable Incidents
	   j. Provider Appeal Submission
	   k. Treatment Plans
	   l. ASAM Assessment
	10. Submit claims (billing) to SAPC
	11. Access Financial Reports

(6) Financial + Clinical – Counselor	Counseling staff may also be involved in submitted claims for treatment conducted. This access group will allow counseling staff to also submit claims for reimbursement-eligible services.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. Enter Cal-OMS data
	3. Create a Cal-OMS Admission and Discharge
	4. Perform Cal-OMS Annual Updates
	5. Create a Service Authorization
	6. Complete Provider Diagnosis (ICD-10) Form (note: should only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's)
	7. Update Other Health Coverage Form
	8. View Clinical Contact
	9. Create *Draft* version as well as *Finalize* most Sage Clinical Forms, unless indicated otherwise:
	   a. Progress Notes (All versions)
	   b. Drug Testing
	   c. Miscellaneous Note Options
	   d. Patient Medications
	   e. Discharge and Transfer Form
	   f. Recovery Bridge Housing Discharge
	   g. Provider Adverse Event Reporting
	   h. Provider Complaints/Grievances
	   i. Provider Reportable Incidents
	   j. Provider Appeal Submission
	   k. Treatment Plans* (can only access DRAFT functionality)
	   l. ASAM Assessment* (can only access DRAFT functionality)
	10. Perform claim (billing) to the County
	11. Access financial reports

(7) Financial + Clinical – Licensed-Eligible LPHA	Some LPHA's and licensed-eligible LPHA's also submit billing claims or are involved in financial matters. This access group is intended for such staff and includes the most comprehensive amount of permissions.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. Enter Cal-OMS data
	3. Create a Cal-OMS Admission and Discharge
	4. Perform Cal-OMS Annual Updates
	5. Create a Service Authorization
	6. Complete Provider Diagnosis (ICD-10) Form
	7. Update Other Health Coverage Form
	8. View Clinical Contact
	9. Create <u>both</u> a *Draft* version as well as *Finalize* the following Sage Clinical Forms:
	   m. Progress Notes (All versions)
	   n. Drug Testing
	   o. Miscellaneous Note Options
	   p. Patient Medications
	   q. Discharge and Transfer Form
	   r. Recovery Bridge Housing Discharge
	   s. Provider Adverse Event Reporting
	   t. Provider Complaints/Grievances
	   u. Provider Reportable Incidents
	   v. Provider Appeal Submission
	   w. Treatment Plans
	   x. ASAM Assessment
	10. Submit claims (billing) to SAPC
	11. Access Financial Reports

(8) LVN and Medical Assistant	The access group was designed for the primary purpose of Safeguarding Medications in Residential levels of Care and in dispensing medications. NOTE: LVNs and MAs are not able to provide billable services under START-ODS at this time. At a high-level, users with this Access Group can: 1. Admit a Client 2. View/Edit Client Consent 3. View/Add/Edit Client File Attachment 4. View/Add/Edit Women's Health History 5. View/Edit Demographic 6. View/Edit Financial Eligibility 7. View Client Eligibility Verification Report 8. View Look Up Client/Main Menu/Provider Menu/Reports Menu 9. View Provider Activity Report 10. View Authorization Status Report/Authorizations, Avatar Admission, Avatar Diagnosis 11. View Cal-OMS Admission, Annual Update and Discharge 12. Update Other Health Coverage Form 13. View ASAM Assessment 14. View/Edit/Finalize Clinical Contact 15. View/Edit/Finalize Drug Testing 16. View/Edit/Finalize Miscellaneous Note Options 17. View/Edit/Finalize Patient Medications 18. View Progress Notes (BIRP, GIRP, SIRP, and SOAP) 19. View/Edit/Finalize the following: 20. Adverse Event Reporting 21. Provider Appeals Submission 22. Provider Complaints/Grievances 23. Provider No Show Log 24. Provider Reportable Incidents 25. View Recovery Bridge Housing Discharge 26. View Treatment Plan

(9) Clinical Only – Student/Intern	Students / interns are required to have co-signatures on most of their documents. As a result, they are limited in what services they can provide independently without these co-signatures. This access group was designed with these limits in mind.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. Enter Cal-OMS data
	3. Create a Cal-OMS Admission and Discharge
	4. Perform Cal-OMS Annual Updates
	5. Create a Service Authorization
	6. Complete Provider Diagnosis (ICD-10) Form (note: should only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's)
	7. Update Other Health Coverage Form
	8. View Clinical Contact
	9. Create *Draft* version of most Sage Clinical Forms, unless indicated otherwise:
	    a. Progress Notes (All versions)* (can only access DRAFT functionality)
	    b. Drug Testing*
	    c. Miscellaneous Note Options* (can only access DRAFT functionality)
	    d. Patient Medications*
	    e. Discharge and Transfer Form* (can only access DRAFT functionality)
	    f. Recovery Bridge Housing Discharge* (can only access DRAFT functionality)
	    g. Provider Adverse Event Reporting
	    h. Provider Complaints/Grievances
	    i. Provider Reportable Incidents
	    j. Provider Appeal Submission
	    k. Treatment Plans* (can only access DRAFT functionality)
	    l. ASAM Assessment* (can only access DRAFT functionality)

(10) Audit User (View -Only of <u>SELECT</u> Clinical and Financial Data)	Within each organization, there may be a need for certain staff to have view-only access to Admission, Clinical and Financial data. This Access Group allows these users to have view-only access to the Sage system, but they are limited from being able to change any data. At a high-level, users with this Audit User Access Group can: 1. Look up Clients 2. View Admission and Demographics information 3. View Diagnosis 4. View CalOMS Admission, Annual Update, and Discharge 5. View Financial Eligibility 6. View Authorizations and Attachments 7. View Treatment Form 8. View Billing 9. View Services Denied 10. Update Other Health Coverage Form This Audit User has access to the following types of reports: 1. Audit Log Report 2. Treatment Plan Worklist Report 3. Authorization Request Status Report 4. Provider Activity Report 5. Financial Reports The Audit User CANNOT access specific Clinical forms such as: 1. Progress Notes 2. Discharge and Transfer Form 3. Drug Testing and Patient Medications 4. Provider Appeals, Complaints & Grievances, or Reportable Incidents
(11) Operations (View-Only of <u>ALL</u> Clinical and Financial Forms)	The Operations Access Group has broad view-only access to the total Sage system, and allows greater view-only access than the Audit User Access Group, which only permits view-only access to select clinical and financial data. At a high-level, users with this Operations (View-Only) Access Group can view: 1. All Admission, Clinical and Financial form in ProviderConnect 2. Access All ProviderConnect reports 3. View Check/EFT Number Report 4. Update Other Health Coverage Form

(12) Clerical	Depending on the organization, clerical staff may need to access Sage. This Clerical Access Group allows clerical staff to have access to admission and demographic data, Cal-OMS creation, and view selected eligibility and authorization data. At a high-level, users with this Clerical Access Group can: 1. Perform New Client Search 2. Add New Client/Provider Admission 3. Create Client Consent 4. View, Create and Edit Cal-OMS Admission 5. Create Cal-OMS Annual Update 6. Create Cal-OMS Discharge 7. View and Edit Demographics 8. View Financial Eligibility 9. Create and Edit Clinical Contact 10. View Authorizations 11. View Provider Diagnosis (ICD-10) 12. Update Other Health Coverage Form The Clerical Access Group can review the following Reports: 1. Authorization Request Status Report This Access Group CANNOT: 1. Enter/Edit Financial Eligibility 2. View/Enter/Edit Women's Health History 3. View/Enter/Edit Treatment 4. View/Enter/Edit ASAM Assessment
(13) Clinical Visible Only – No Login	There may be times when you need to have a staff show up in certain Clinical dropdown lists in order for others to complete certain forms. However, it is not expected that they would ever need to enter data into Sage directly. In order to choose this role for staff, you must confirm that these staff will NOT NEED: 1. To complete an ASAM Assessment or other form in Sage 2. A Login to Sage 3. Any Training Set up requires the same information needed for any other Clinical role.

(14) Certified Peer Support Specialist	This is intended for Certified Peer Support Specialist. This access group allows these Certified Peer Support Specialist staff to conduct non-clinical treatment services including, Educational Skill Building, Engagement Services, Therapeutic Activity, problem list/treatment plans and the documentation of those services.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. View and Edit Demographics
	3. Enter Cal-OMS data
	4. Create a Cal-OMS Admission and Discharge
	5. Perform Cal-OMS Annual Updates
	6. View Authorizations
	7. Create Draft version as well as Finalize most Sage Clinical Forms, unless indicated otherwise:
	   a. Progress Notes (All versions)
	   b. Drug Testing
	   c. Miscellaneous Note Options
	   d. Patient Medications
	   e. Discharge and Transfer Form
	   f. Recovery Bridge Housing Discharge
	   g. Provider Complaints/Grievances
	   h. Provider Appeal Submission
	   i. Treatment Plans* (can only access DRAFT functionality)
	
	Report access:
	1. Access to all alerts
	2. Audit Log Report
	3. Treatment Plan Worklist Report
	4. Authorization Request Status
	5. Client Eligibility Verification Report

(15) **Financial + Certified Peer Support Specialist**	This is intended for Certified Peer Support Specialists who also submit billing claims or are involved in financial matters.
	
	At a high-level, users with this Access Group can:
	1. Admit a client
	2. View and Edit Demographics
	3. Enter Cal-OMS data
	4. Create a Cal-OMS Admission and Discharge
	5. Perform Cal-OMS Annual Updates
	6. Perform claim (billing) to the County
	7. Update Other Health Coverage Form
	8. Access financial reports
	9. View Authorizations
	10. View Provider Diagnosis (ICD-10) Form
	11. View ASAM Assessment
	12. View Women's Health History
	13. View Client Eligibility Verification Report
	14. View Treatment Plan Worklist Report
	15. View Clinical Contact
	16. View Discharge and Transfer Assessment/Form
	17. Create Draft version as well as Finalize most Sage Clinical Forms, unless indicated otherwise:
	   a. Progress Notes (All versions)
	   b. Drug Testing
	   c. Miscellaneous Note Options
	   d. Patient Medications
	   e. Discharge and Transfer Form
	   f. Recovery Bridge Housing Discharge
	   g. Provider Complaints/Grievances
	   h. Provider Appeal Submission
	   i. Treatment Plans* (can only access DRAFT functionality)
	Report access:
	1. Access to all alerts
	2. Audit Log Report
	3. Treatment Plan Worklist Report
	4. Authorization Request Status
	5. Client Eligibility Verification Report
	6. Provider Activity Report
	7. Financial Reports

NOTE ON SUPERUSERS

A Superuser is a staff member that is usually in a leadership role, who performs higher-level functions that require a deeper knowledge of the system. Importantly, Superusers also serve as the primary source of support for other staff who may need assistance navigating Sage. It is recommended that organizations designate one Superuser for every ten staff, with no less than three Superusers per organization.

Training for Superusers should include both Clinical and Financial training, regardless of Access Group designation, so that these users have an understanding of the full suite of business processes available in Sage.   Superusers should be identified on the User Creation Form to receive additional training.