Sage User Role 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 user role, a more accurate way of approaching this is to consider what access to the different functionalities in Sage each staff member should have. This access is 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 User Roles and their privileges to assist providers in determining the level of access staff should have within Sage.

Agency Sage Liaisons will be asked to identify ONE (1) "User Role" for the staff member they are requesting access for when creating a Sage Helpdesk User Creation ticket. If the User Role includes clinical responsibilities because the user is expected to perform clinical functions, then 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 staff providing billable services)
2. **Current Registration/Licensure Date** (date registered with their respective board or governing body)
3. **Drug Enforcement Administration Identification Number (required for prescribing providers)**
4. **Practitioner Category** (Counselor and LPHA distinctions)
5. **Discipline** (Type of certification or license)
6. **Taxonomy Code** (required for any clinical staff providing billable services)
7. **Supervisor's information** (required by the State for clinical trainees and Community Health Workers (CHW)

Providers should only request access to User Roles for which the staff is certified or credentialed. For example, counselors or student/intern staff SHOULD NOT be placed in LPHA User Role regardless of their administrative positions or responsibilities.

This document includes an overview of the following User Roles:

User Role	Description
User Role 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 can create a new record of a document versus who only has access to view a record). Selecting the appropriate User Role 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.	

User Role	Description
(1) PCNXClinicalOnlyLPHA • Includes: • LMFT, LCSW, LPCC • AMFT, ASW, APCC • Psychologist • Physician Assistant • Nurse Practitioner • Physician	This User Role is exclusively for diagnosing 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 LE LPHA's may finalize ASAM assessments and Medical Necessity Justification Progress notes and are required to approve Problem Lists. At a high-level, users with this User Role can: 1. Admit a client 2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 3. View/Add/Edit a Service Authorization Request 4. View/Add/Edit the Diagnosis 5. View/Add/Edit Financial Eligibility 6. View/Add/Edit Client Other Healthcare Coverage Form 7. View/Add/Edit Women's Health History 8. Upload and View Attachments 9. Create both a *Draft* version as well as *Finalize* the following Sage Clinical Forms: a. ASAM Assessment: CO-Triage® and Continuum™ b. View/Add/Edit Discharge and Transfer Form c. View/Add/Edit Drug Testing d. View/Add/Edit Patient Medications e. View/Add/Edit Problem List/Treatment Plan f. View/Add/Edit Progress Note g. View/Add/Edit Recovery Bridge Housing Discharge h. View/Add/Edit Referral Connections 10. Run clinical documentation related reports including but not limited to: a. Progress Note Status Report b. Problem List/Treatment Plan Worklist c. Printout reports

User Role	Description
(2) PCNXClinicalOnlyCounselor Includes: • Registered SUD Counselors • Certified SUD Counselors • Community Health Workers **Note: CHWs require a Supervisor's NPI for billing**	This is intended for certified or registered counselors as well as Community Health Workers (CHW). This User Role allows these counseling staff to conduct standard treatment services including group counseling, individual sessions, Problem List/Treatment Plans, and the documentation of those services. At a high-level, users with this User Role can: 1. Admit a client 2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 3. View/Edit a Service Authorization 4. View/Add/Edit the Diagnosis form (Note: only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's) 5. View/Add/Edit Financial Eligibility 6. View/Add/Edit Client Other Healthcare Coverage Form 7. View/Add/Edit Women's Health History 8. Upload and View Attachments 9. Create *Draft* versions as well as *Finalize* most Sage Clinical Forms, unless indicated otherwise: a. ASAM CO-Triage® b. ASAM Continuum™ (requires diagnosing LPHA's finalization) c. View/Add/Edit Discharge and Transfer Form d. View/Add/Edit Drug Testing e. View/Add/Edit Patient Medications f. View/Add/Edit Problem List/Treatment Plan (requires LPHA's finalization) g. View/Add/Edit Progress Note (Medical Necessity Justification requires diagnosing LPHA's finalization) h. View/Add/Edit Recovery Bridge Housing Discharge i. View/Add/Edit Referral Connections 10. Run clinical documentation related reports including but not limited to: a. Progress Note Status Report b. Problem List/Treatment Plan Worklist Report c. Printout reports

User Role	Description
(3) PCNXCertPeerSupSpec Includes: • Medi-Cal Certified Peer Support Specialist	This User Role is for Medi-Cal Certified Peer Support Specialists, as defined by SAPC's Provider Manual for Substance Use Disorder Treatment Services. These staff provide non-clinical, recovery-oriented, culturally appropriate services that promote engagement, socialization, self-sufficiency, self-advocacy, natural supports, and are trauma-aware. At a high-level, users with this User Role can: 1. Admit a client 2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 3. View/Add/Edit a Service Authorization 4. View/Add/Edit a Discharge and Transfer Form 5. View/Add/Edit a Drug Testing form 6. View/Add/Edit a Patient Medications form 7. Add to a Problem List/Treatment Plan (requires LPHA's finalization) 8. View/Add/Edit a Progress Note (Plan of Care Note requires Peer Support Specialist Supervisor finalization) 9. View/Add/Edit Recovery Bridge Housing Discharge

User Role	Description
(4) PCNXFinancialOnly	This User Role is designed for staff who deal with the organization's finances, specifically those staff who will submit billing claims for SUD treatment services eligible for reimbursement from the County. At a high-level, users with this User Role can: 1. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 2. Perform claim (billing) to the County 3. View/Add/Edit Financial Eligibility 4. View/Add/Edit Client Other Healthcare Coverage 5. View/Add/Edit Service Authorization Requests 6. View Only Diagnosis 7. View Only Women's Health History 8. View Only Discharge and Transfer Form 9. View Only Drug Testing 10. View Only Patient Medications 11. View Only Recovery Bridge Housing Discharge 12. View Only Problem List/Treatment Plan 13. Run financial related reports including but not limited to: a. MSO Provider Config Report 2023+ b. Provider Services Detail Report c. Provider Services Summary Report d. Batch Status Report

<table>
<tr><th>User Role</th><th>Description</th></tr>
<tr><td>(5) PCNXFinClinLPHA

Includes:
LMFT, LCSW, LPCC,
AMFT, ASW, APCC
Psychologist
Physician Assistant
Nurse Practitioner
Physician</td><td>Some LPHA’s and licensed-eligible LPHA’s also submit billing claims or are involved in financial matters. This User Role is intended for such staff and includes the most comprehensive number of permissions.

At a high-level, users with this User Role can:
1. Admit a client
2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges
3. View/Add/Edit a Service Authorization
4. View/Add/Edit the Diagnosis form (Note: only enter diagnosis endorsed in the ASAM assessment by LPHA’s or licensed-eligible LPHA’s)
5. View/Add/Edit Financial Eligibility
6. View/Add/Edit Client Other Healthcare Coverage
7. View/Add/Edit Women’s Health History
8. Upload and View Attachments
9. Create <u>both</u> a Draft version as well as Finalize the following Sage Clinical Forms:
a. ASAM Assessment: CO-Triage® and Continuum™
b. View/Add/Edit Discharge and Transfer Form
c. View/Add/Edit Drug Testing
d. View/Add/Edit Patient Medications
e. View/Add/Edit Problem List/Treatment Plan
f. View/Add/Edit Progress Note
g. View/Add/Edit Recovery Bridge Housing Discharge
h. View/Add/Edit Referral Connections
10. Run clinical documentation related reports including but not limited to:
a. Progress Note Status Report
b. Problem List/Treatment Plan Worklist Report
c. Printout reports
11. Submit claims (billing) to SAPC
12. Run financial related reports including but not limited to:
a. MSO Provider Config Report 2023+
b. Provider Services Detail Report
c. Provider Services Summary Report
d. Batch Status Report</td></tr>
</table>

(6) PCNXFinClinCounselor Includes: • Registered SUD Counselor • Certified SUD Counselor	Counseling staff may also be involved in submitting claims for treatment conducted. This User Role will allow counseling staff to also submit claims for reimbursement-eligible services. At a high-level, users with this User Role can: 1. Admit a client 2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 3. View/Edit a Service Authorization 4. View/Add/Edit the Diagnosis form (Note: only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's) 5. View/Add/Edit Financial Eligibility 6. View/Edit Client Other Healthcare Coverage 7. View/Add/Edit Women's Health History 8. Upload and View Attachments 9. Create *Draft* version as well as *Finalize* most Sage Clinical Forms, unless indicated otherwise: a. ASAM CO-Triage® b. ASAM Continuum™ (requires diagnosing LPHA's finalization) c. View/Add/Edit Discharge and Transfer Form d. View/Add/Edit Drug Testing e. View/Add/Edit Patient Medications f. View/Add/Edit Problem List/Treatment Plan (requires LPHA's finalization) g. View/Add/Edit Progress Note (Medical Necessity Justification requires diagnosing LPHA's finalization) h. View/Add/Edit Recovery Bridge Housing Discharge i. View/Add/Edit Referral Connections 10. Run clinical documentation related reports including but not limited to: a. Progress Note Status Report b. Problem List/Treatment Plan Worklist Report c. Printout reports 11. Submit claims (billing) to the County 12. Run financial related reports including but not limited to: a. MSO Provider Config Report 2023+ b. Provider Services Detail Report c. Provider Services Summary Report

<table>
<tr><th>User Role</th><th>Description</th></tr>
<tr><td>(7) PCNXCertPeerFinClin

Includes:
• Medi-Cal Certified Peer Support Specialist</td><td>This User Role is for Medi-Cal Certified Peer Support Specialists, as defined by SAPC's Provider Manual for Substance Use Disorder Treatment Services. These staff provide non-clinical, recovery-oriented, culturally appropriate services that promote engagement, socialization, self-sufficiency, self-advocacy, natural supports, and are trauma-aware as well as submit billing claims for treatment services eligible for reimbursement from the County.

At a high-level, users with this User Role can:
1. Admit a client
2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges
3. Add to a Problem List/Treatment Plan (requires LPHA's finalization)
4. View/Add/Edit a Progress Note (Plan of Care Note requires diagnosing LPHA's finalization)
5. View/Add/Edit Client Other Healthcare Coverage
6. View/Add/Edit Financial Eligibility
7. Submit claims (billing) to SAPC
8. Run financial related reports including but not limited to:
a. MSO Provider Config Report 2023+
b. Provider Services Detail Report
c. Provider Services Summary Report
d. Batch Status Report</td></tr>
</table>

User Role	Description
(8) PCNXRNLVNLPTMA Includes: • RN • LVN • LPT • MA	This User Role was designed for non-diagnosing medical staff, whose duties include safeguarding and dispensing medications as well as providing Medication Services as defined by SAPC's Provider Manual for Substance Use Disorder Treatment Services. At a high-level, users with this User Role can: 1. Admit a Client 2. View Only Cal-OMS Admission, Annual Updates and Discharges 3. Upload and View Attachments 4. View/Add/Edit Women's Health History 5. View/Add/Edit Financial Eligibility 6. View/Add/Edit the Diagnosis form (Note: only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's) 7. View/Edit Service Authorization Request 8. View/Edit Client Other Healthcare Coverage 9. View/Add/Edit Drug Testing 10. View/Add/Edit Patient Medications 11. View/Add/Edit Problem List/Treatment Plan (May be finalized by RNs but not other disciplines listed in this group) 12. View/Add/Edit Progress Note (Medical Necessity Justification requires diagnosing LPHA's finalization) 13. View Only Recovery Bridge Housing Discharge 14. Run clinical documentation related reports including but not limited to: a. Progress Note Status Report b. Problem List/Treatment Plan Worklist Report c. Printout reports

User Role	Description
(9) PCNXStudentIntern Includes: • Clinical Social Worker Trainee • Medical Student in Clerkship • MFT Trainee • Occupational Therapist Trainee • Pharmacist Trainee • Physician Assistant Trainee • Professional Clinical Counselor Trainee • Psychiatric Technician Trainee • Psychologist Trainee • Registered Nurse Trainee • Vocational Nurse Trainee **Note: All clinical trainees require a Supervisor's NPI for billing**	This user role was created to functionally accommodate students/interns across disciplines. 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 User Role was designed with these limits in mind. At a high-level, users with this User Role can: 1. Admit a client 2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 3. View/Edit Service Authorization Request 4. View/Add/Edit the Diagnosis form (Note: only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's) 5. View/Edit Client Other Healthcare Coverage 6. Create *Draft* version of most Sage Clinical Forms all of which REQUIRE a co-signature by the user's supervisor: a. Progress Note b. Drug Testing c. Patient Medications d. Discharge and Transfer Form e. Recovery Bridge Housing Discharge f. Problem List/Treatment Plan g. ASAM Assessment (Note: The CO-Triage still requires a supervisor to finalize.)

User Role	Description
(10) PCNXAuditUser	This User Role is intended for State Auditors. It provides view-only access to forms and the ability to run clinical and financial reports. Agency staff should NOT be associated to this user role. At a high-level, users with this User Role can: 1. Look up Clients 2. View Only Admission and Demographics information 3. View Only Diagnosis 4. View Only CalOMS Admission, Annual Update, and Discharge 5. View Only Financial Eligibility 6. View Only Authorizations and Attachments This Audit User has access to the following types of reports: 1. Treatment Plan Worklist Report 2. Authorization Request Status Report 3. Provider Activity Report 4. Progress Note Status Report 5. Printouts 6. Financial Reports
(11) PCNXOperations	The Operations User Role provides view-only access to forms and the ability to run clinical and financial reports. Unlike the PCNXAudit user role that is intended for State Auditors, PCNXOperations is intended for provider staff assignment. At a high-level, users with this Operations (View-Only) User Role can view: 1. View Only Admission, Clinical and Financial forms in Sage 2. Run Clinical and Financial reports

User Role	Description
(12) PCNXClerical	Depending on the organization, clerical staff may need to access Sage. This Clerical User Role 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 User Role can: 1. Admit a client 2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 3. View Only Financial Eligibility 4. View Only Authorizations 5. View Only Diagnosis 6. View/Add/Edit Client Other Healthcare Coverage 7. View/Add/Edit Release of Information_In Network 8. View/Add/Edit Patient Handbook and Orientation Video Acknowledgement 9. Run Real-Time Inquiry (270) Request The Clerical User Role can review the following Reports: 10. Authorization Request Status Report 11. Release of Information_In Network Report 12. Provider File Attach Report 13. Problem List Reminder Report 14. Census Report

User Role	Description
(13) Credentialing Only – No Login	Clinical staff at contracted provider agencies who have their own EHR systems may not need Sage logins but do need to be credentialed within Sage & SAPC's treatment network in order to have their claims accepted and processed. Additionally, there may be times when you need to have a staff's name display in certain fields in order to complete forms, such as the Admission (Outpatient) form. However, it is not expected that these staff would ever need to enter data into Sage directly, as they conduct their tasks in their agency's EHR. 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 forms in Sage 2. A Login to Sage 3. Any Sage related training Credentialing for this user role requires the same information needed for any other Clinical role.

User Role	Description
(14) PCNXPeerSupportSupervisor	This user role is intended for Peer Support Specialists who serve as the Supervisor for other Medi-Cal Certified Peer Support Specialists, which necessitates a higher level of system access. Specifically, this User Role is for supervising 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. SUD Counselors or LPHAs who supervise Peer Support Specialists do not need to be assigned to this user role to fulfill their supervisory responsibilities. At a high-level, users with this User Role can: 1. Admit a client 2. View/Add/Edit Cal-OMS Admission, Annual Updates and Discharges 3. View/Edit Service Authorization Request 4. View/Add/Edit Women's Health History 5. Create most Sage Clinical Forms: a. View/Add/Edit Discharge and Transfer Form b. View/Add/Edit Drug Testing c. View/Add/Edit Patient Medications e. View/Add/Edit Problem List/Treatment Plan (requires LPHA's finalization) d. View/Add/Edit Progress Notes (Note: authorized to finalize a Peer Support Plan of Care) e. View/Add/Edit Recovery Bridge Housing Discharge 6. Run clinical documentation related reports including but not limited to: a. Authorization Request Status Report b. Documents in Draft and for Co Signature c. Problem List/Treatment Plan Worklist Report d. Progress Note Status Report

User Role	Description
(15) PCNXCENS **Note: User must be part of a CENS program*	This user role is intended for Client Engagement and Navigation Services (CENS) staff who are providing various activities including screening and referrals to SUD services, client education, Medi-Cal eligibility and enrollment assistance, and navigation services. At a high-level, users with this User Role can: 1. Admit a client 2. View/Add/Edit ASAM Assessment: CO-Triage 3. View/Add/Edit the Diagnosis form (Note: only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's) 4. View/Add/Edit Service Connections Log 5. View/Add/Edit Women's Health History 6. View/Add/Edit Progress Notes 7. View/Add/Edit Drug Testing 8. View/Add/Edit Patient Medications 9. View/Add/Edit Financial Eligibility 10. Perform claim (billing) to the County 11. Update Client Other Healthcare Coverage Form 12. Run Real-time 270 Eligibility Request 13. Run clinical documentation and financial related reports including but not limited to: a. Census Report b. MSO Provider Config Report 2023+ c. Progress Note Status Report d. Printout

User Role	Description
(16) PCNXFinRNLVNLPTMA Includes: • RN • LVN • LPT • MA	This User Role was designed for non-diagnosing medical staff, whose duties include Safeguarding and dispensing medications as well as providing Medication Services as defined by SAPC's Provider Manual for Substance Use Disorder Treatment Services. This User Role will allow LVs, LPTs, and MAs to also submit claims for reimbursement-eligible services and access financial reports. At a high-level, users with this User Role can: 1. Admit a Client 2. View Only Cal-OMS Admission, Annual Updates and Discharges 3. Upload and View Attachments 4. View/Add/Edit Women's Health History 5. View/Add/Edit Financial Eligibility 6. View/Add/Edit the Diagnosis form (Note: only enter diagnosis endorsed in the ASAM assessment by LPHA's or licensed-eligible LPHA's) 7. View/Edit Service Authorization Request 8. View/Edit Client Other Healthcare Coverage 9. View/Add/Edit Drug Testing 10. View/Add/Edit Patient Medications 11. View/Add/Edit Problem List/Treatment Plan (may be finalized by RNs but not by other disciplines listed in this group) 12. View/Add/Edit Progress Note (Medical Necessity Justification requires diagnosing LPHA's finalization) 13. View Only Recovery Bridge Housing Discharge 14. Run clinical documentation related reports including but not limited to: a. Progress Note Status Report b. Problem List/Treatment Plan Worklist Report c. Printout reports 15. Run financial related reports including but not limited to: a. MSO Provider Config Report 2023+ b. Provider Services Detail Report c. Provider Services Summary Report d. Batch Status Report