SAGE

NETSMART

Training Pre-Registration

- Complete information for each trainee that has been requested by SAPC is required to attend training:
    - C-#s
    - Access Group
    - Discipline (if a clinical Practitioner)
- Review staff names you have provided to attend training
    - Is it accurate? – Is everyone included?
- Each trainee will need a distinct email address

Given the time needed to complete enrollment to get a C#, it will be difficult to add staff “on the fly” for this training

Training Registration

- Registration will be on a "first-come" basis
- There will be training for providers:
  - With an Electronic System and
  - Without an Electronic System
- Registration period will be open for a short time period
- Training location maps will be provided for all classes
- Why register early?
  - There will be Practice / Refresher sessions where staff who have successfully completed training can practice

Training

- Training will be hands-on
- Training will be specific to a typical role
- Training will include competency checks
  – Ensure that trainees are practicing Sage transactions
- Training is required

Access to Sage will NOT be given until trainings are completed

Training for Providers without an EHR

- Training must include staff who you are planning to work with Sage:
  - CENS
  - Admissions
    - Front desk staff or anyone who will be entering CalOMS/LACPRS data
  - Clinical staff
    - Anyone who will assess level of care, create treatment plan, enter progress notes or any clinical data

Training for Providers without an EHR (cont.)

- Training must include staff who you are planning to work with Sage:
  - Billing
    - Anyone who will be entering services and submitting or reconciling claims with SAPC
  - Management
    - Anyone who will be viewing KPI Dashboard (analysis) reports and/or needs to understand the data in the system

Training for Providers with an EHR

Training should include staff (who will using Sage):

- CENS
- Admissions
  - Front desk staff (a client must be admitted into Sage)
  - Anyone who will need to enter CalOMS / LACPRS data until the provider EHR system is aligned to send data electronically

Training for Providers with an EHR (cont.)

Training should include staff (who will using Sage):

- Clinical staff who will:
  - Perform an ASAM Assessment
  - Need to capture required Treatment Plan, Progress Notes or other data required for authorization approval

Training for Providers with an HER (cont.)

Training should include staff (who will using Sage):

- Billing
  - Anyone who will be submitting or reconciling claims within Sage

  *Note: If your system has been certified to send 837 transactions with Sage, a Financial Super User must have been trained on Sage for billing

- Management
  - Anyone who will be viewing KPI Dashboard (analysis) reports and/or needs to understand the data in the system

Training for Super Users

- Super User role is a critical role for YOUR organization
- Understands the "big picture" through cross training
- Your Super User should be assisting you NOW in understanding changes to your process flows
- Point of internal contact and accessing the Help Desk Ongoing resource for evaluating internal process improvements
- Assist in working with users to reduce anxiety, keep attitudes positive, bring clarity

Sage at Startup

- Converted Data:
  - – Client demographic
  - – Provider organization information
  - – Program information for each Provider
  - – Provider staff information provided to SAPC
    - Information must be complete to be included

Sage after Startup

- After Startup
  - The Sage Help Desk will set up Users on an ongoing basis
  - Requests are to be made through the provider SAPC focal point (normally the Super User)
  - Users must have a C-# and provide all data requested in the format requested

Sage Cutover

- There will be a data entry cutoff for the current system
- There will be a few days to cutover to the Sage
- During this time the data conversion will occur - data will be populated into Sage

Sage Cutover (cont.)

– During this "cutoff" period, no new client data or users will be converted to Sage
– Providers will have hold admission data and services during this time period and then enter them into Sage
– Specific instructions will be provided by SAPC on what data to collect during this short "cutoff" period

Sage Helpdesk

- Sage Netsmart Help Desk is operational and “Live”
- For the first few weeks after initial Productive Use:
  - Call volume is expected to the highest
  - Use your Super User first to answer questions
  - Super User should call Sage Help Desk if possible
  - If not, a User can call the Sage Help Desk

Sage Helpdesk (cont.)

- The Sage Help Desk goal is to work to answer / resolve questions quickly
- For some issues, if needed, the ticket will be routed to other help desk levels
- The Sage Help Desk will change key/restricted data not available to be changed by a User
    - Examples - date of admission - a birthdate