Sage Updates

SAPC | Substance Abuse Prevention and Control

County of Los Angeles Public Health

Agenda

- ROI Updates
- Individual Service Level (ISL) Key Points
- ASCMI Form and Requirements
- Sage Form/Report/Widget Updates
- Authorization Funding Source Workflow
- Clinical Trainings

DHCS Authorization to Share Confidential Member Information (ASCMI)

County of Los Angeles Public Health

Non-AB 133 Version 2.0

- CFR and HIPAA Compliant to release information between counties and DHCS, CA county to CA county and within various internal county departments, such as between SAPC and Housing or SAPC and DMH.
- Used for non Medi-Cal beneficiaries, but can also be used for Medi-Cal beneficiaries should counties chose to do so.
- Allows for additional opting in and out of what information can be disclosed (MH, SUD, Genetic, ID/DD, HIV and Housing)
- SAPC has elected to utilize the NonAb133 version for all clients

AB 133 Version 2.0

- Assembly Bill 133 created as a framework for data exchange
- CFR and HIPAA Compliant to release information between counties and DHCS, CA county to CA county and within various internal county departments, such as between SAPC and Housing or SAPC and DMH.
- AB133 version can only be used for Medi-Cal beneficiaries, not for all clients.
- Limited options for opting in or out of what can be disclosed. (Only includes MH and SUD options for disclosure)

Generalizability of the ASCMI

1.2 Who Can Share and Receive Your Information

Care Partners may share your information. Care Partners are providers and organizations you have seen before, are seeing now, or may see in the future. These Care Partners may include:

- Health care providers, including primary care providers and mental health providers.
- Substance use disorder providers, such as opioid treatment programs and residential treatment programs.
- Community-based organizations and homeless service providers.
- Health insurance plans, including Medi-Cal managed care plans and behavioral health plans.
- County health and human services agencies.
- Qualified health information organizations.
- State health and human services agencies.

Excerpt form DHCS ASCMI Form

ASCMI and SAPC ROI Considerations

ASCMI allows for a general consent for operational support and coordination of care between DHCS, Counties and MCPs. Covers operational support and data exchange.

ROI For Payment and Operations is ***ALWAYS*** required for all clients regardless of other consents that have been signed.

Future state: DHCS is developing a Consent Management Platform (CMP) that will interact with Sage in real time to verify current ASCMI consents.

Requirements for ASCMI

Effective January 1, 2027, DHCS will require use of the ASCMI (either AB 133 or Non AB133) for all counties and Managed Care Plans.

Providers must discuss this form with all clients, whether Medi-Cal beneficiaries or not. Providers should encourage clients to sign the Non-AB133 version per SAPC and DHCS policy to allow providers to better advocate for client services.	Clients are not required to sign the ASCMI as a condition to receive DMC or SAPC funded services.	If the client refuses to sign the ASCMI, they must sign a ROI for Treatment and Care Coordination for SAPC and Providers to coordinate referrals with Managed Care Plans.

ASCMI Links and Resources

- https://www.dhcs.ca.gov/calaim-transforming-medi-cal/authorization-to-share-confidential-member-information/
- ASCMI Form: AB 133
  - English
  - Language translations
- ASCMI Form: Non-AB 133
  - English
  - Language translations
- ASCMI Revocation Form
  - English
  - Language translations

MCP Updates for Sage

County of Los Angeles Public Health

Preparing for Requirements For Care Coordination with MCPs

Providers must be very diligent about the following:

- Timely, complete, and valid consents
- Timely Provider Site Admissions
- Timely Discharge and Transfer Forms

By providers ensuring these items are completed, accurately and timely, it will allow SAPC to automate the Admission/Discharge/Transfer (ADT) exchange that would otherwise fall on each provider to manage.

Anticipated Workflow and Sage Development

A *new* Sage MCP form is being developed and will be required for all clients assigned to an MCP (appx. 97% of Medi-Cal clients).

There will also be minimal updates to the Discharge and Transfer form to incorporate additional requirements.

Providers should coordinate care with MCPs for Complex Care Management, Enhanced Care Management, Community Supports, and other Supportive Services.

For the initial implementation, Admissions, Discharges and Transfers (ADT) and Discharge Summaries will need to be sent to MCPs for levels of care WM3.7 and WM4.0 only. (Details to be discussed in the training).

Admissions, Discharges and Transfers (ADT) reporting will be automated by SAPC.

1. All clients complete SAPC PO ROI.

(Required for all clients, not MCP specific)

2. Client signs NonAB133 ASCMI for operations and care coordination with MCPs and all other county entities.

3. If client refuses ASCMI → Use ROI for Treatment and Care Coordination (with specific MCP listed and no restrictions to data)

SAPC/Providers accept the AB133 version if sent by MCP to SAPC or Provider.

MCP Trainings for Providers

Tuesday November 17, 2026 | Supporting Whole-Person Care: DHCS-Required Changes for Care Coordination with Medi-Cal Managed Care Plans

- **Location:** Webex
- **Time:** 10:00 am – 12:00 pm
- Click for Flyer | Click for Registration Link
- Links are available on the SAPC training calendar

An in-depth walkthrough of the MCP and ASCMI workflow is being developed with a mid-December anticipated delivery.

- Details will be communicated in future Sage Communications

All trainings will be available in the SAPC-LNC or directly in Sage once available.

SAPC/Sage ROI Updates

County of Los Angeles Public Health

Updated SAPC ROI Forms

- SAPC updated the SAPC Release of Information (ROI) forms to reflect feedback from the Network, including
  - Guidance on minor consent
  - Clear date of expiration
  - Space to list additional authorized individuals and entities
- Providers will be required to use the new forms once electronic copies are available.
- Clients with an active ROI on file do not need to sign an updated ROI form.

The English version of the updated SAPC ROI forms are available on the SAPC webpage, Manuals, Bulletins, and Forms.

The non-English versions of the updated SAPC ROI forms will be available in early November.

Overview SAPC ROI Form Updates

Payment and Operations ROI

- Added guidance on minor consent

Treatment and Care Coordination ROI

- Added guidance on minor consent
- Updated expiration of the ROI form to be 1 year after the date the form was signed
- Embedded link to the Supplemental Authorized Individuals and Entities for ROI form

Legal Proceeding ROI

- Added guidance on minor consent
- Updated expiration of the ROI form to be 1 year after the date the form was signed
- Embedded link to the Supplemental Authorized Individuals and Entities for ROI form
- Revised language to clearly indicate that a Legal Proceeding ROI is required for each type of legal proceeding

Supplemental Authorized Individuals and Entities for SUD Information ROI Form

The **Supplemental Authorized Individuals and Entities for ROI form** is to be used when the client would like to authorize more than 3 individuals or entities on the Treatment and Care Coordination ROI form or the Legal Proceeding ROI form when using the paper version of the form.

The English version of the form is available on the SAPC webpage, Manuals, Bulletins, and Forms.

The form is also currently available in all threshold languages.

Secondary Provider ROI Form Recreation Review Process Update

- SAPC resumed the review of Secondary Provider ROI form recreation and updated the Review Criteria Checklist based on providers' feedback.
- Secondary Providers who are interested in using their recreated ROI form(s) must complete and submit the Secondary Provider Recreation of SAPC ROI Forms Submission Questionnaire, with the recreated SAPC ROI forms attached, to SAPC-HIM@ph.lacounty.gov.
- Submissions of unapproved forms shall be deemed invalid.

The Secondary Provider Recreation of SAPC ROI Forms Submission Questionnaire and Review Criteria Checklist are available on the SAPC webpage, Manuals, Bulletins, and Forms.

Notice to Accompany Disclosures

SAPC created a **Notice to Accompany Disclosures** document for providers to include when responding to ROI request where the written consent does not contain the **required** Part 2 statement, such as the Authorization to Share Confidential Member Information (ASCMI) Form.

The document is available in English and all threshold languages on the SAPC webpage, Manuals, Bulletins, and Forms.

Individual Service Level (ISL) Key Points

County of Los Angeles Public Health

Introduction to Individual Service Level (ISL) Reporting

New DHCS Reporting Requirement

County Behavioral Health Plans (BHPs) are required to report Individual Service Level (ISL) codes to support standardized reporting of behavioral health services by **1/1/2027**.

What is ISL reporting?

ISL reporting is individual-level behavioral health services and expenditures not submitted to Medi-Cal for reimbursement and paid out of county funds or administrative costs.

Who does this apply to?

Primary and Secondary providers are required to document and submit ISL codes to SAPC for services/expenses as of **1/1/2027**.

While there will be code changes, we are working to minimize changes for Secondary providers.

Individual Service Level Reporting

Upcoming PCNX Enhancements

SAPC is developing workflows and new forms to easily capture required information with careful attention to minimizing additional provider work.

SAPC targets to have the form(s) available in PCNX and for provider implementation by December 2026.

Resources

More information can be found on the following DHCS resources:

- DHCS Individual Service Level Encounter Reporting
- DHCS Individual Service Level Encounter FAQ

Individual Service Level Reporting

Key Dates

ISL reporting is effective **1/1/2027**. Providers must start tracking and entering applicable services and expenses for clients on and after **1/1/2027**.

Data can be entered retroactively when the form and training are available.

Additional Important Information

Only clients who have a signed ASCMI form on file will be included in ISL reporting

Live Webinar Targeted for January 2027

Details will be shared in a future Sage Provider Communication- Stay Tuned

Authorization Workflow for Changes in Financial Eligibility

County of Los Angeles Public Health

Updated Guidance for Authorizations

When a client experiences a change in MCAL status, a new authorization needs to be submitted.

- This new process will prevent unnecessary denials and rebilling.

IMPORTANT: It is the provider's responsibility to confirm continued financial eligibility on a monthly basis and to submit an additional service authorization reflecting client's updated funding source, when applicable.

SAPC developed the "Medi Cal Eligibility Change Report" for providers to run at the beginning of each month to immediately identify changes in Medi-Cal status.

Scenarios that Require a New Authorization

DMC to Non-DMC (excluding CIFP):

- If a client with an approved DMC service authorization has their Medi-Cal status becomes inactive, a new service authorization will be required if client is eligible for a non-DMC service funding sources.

Non-DMC (including CIFP) to DMC:

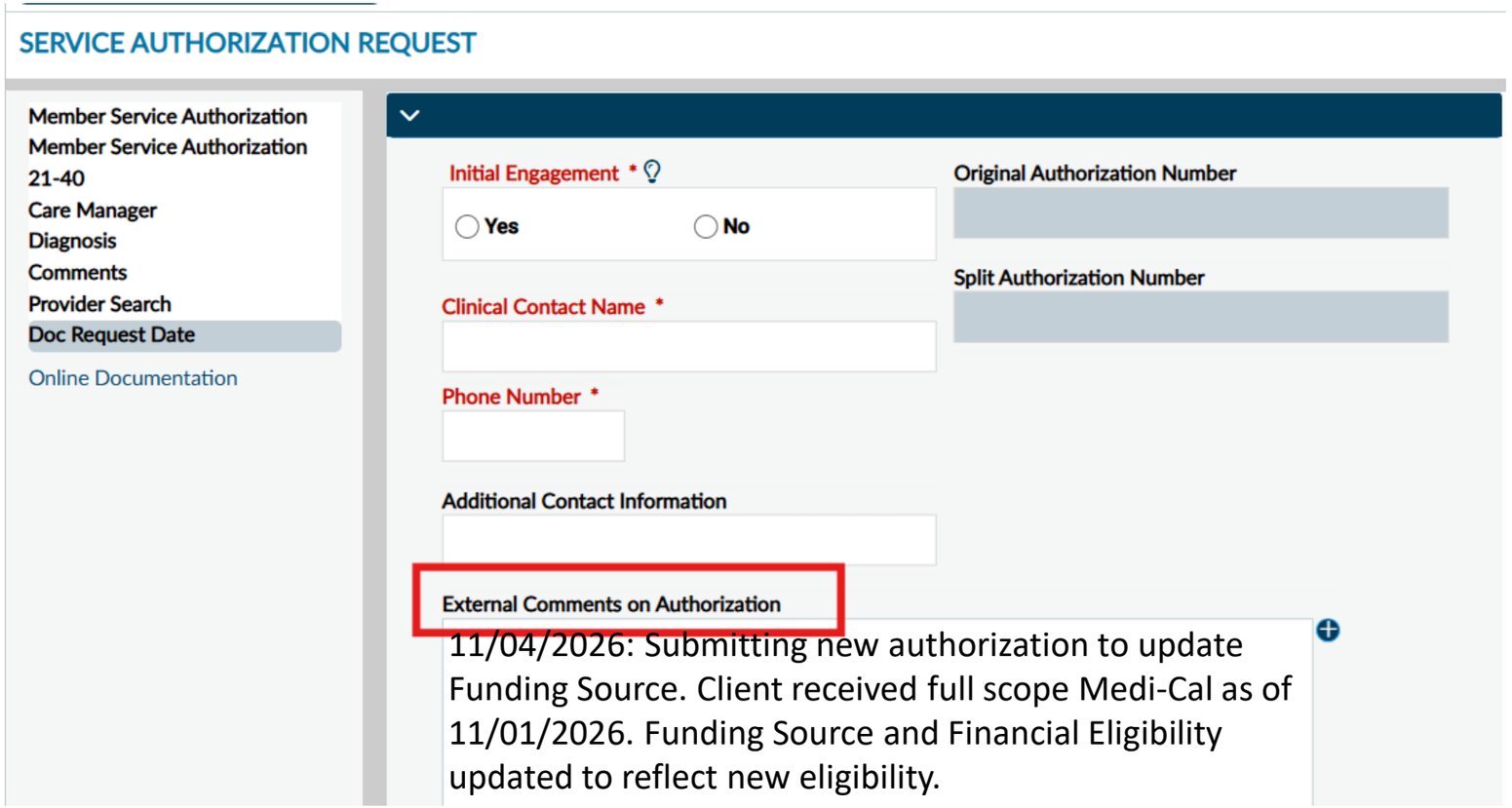
- If a client with an approved non-DMC service authorization becomes eligible for DMC services (full-scope Medi-Cal), a new service authorization will be required to start on the effective date of Medi-Cal coverage

Applying for Medi-Cal to DMC:

- If a client's Medi-Cal (full-scope) is established, a new service authorization will be required to start on the effective date of the Medi-Cal, no matter when in the 30-day authorization time period:
  - If the Applying for Medi-Cal has been billed on, the Void and Replace scenario* will be followed prior to submission of the new DMC authorization

Documentation Requirements for New Auth

Providers are required to enter an “External Comments on Authorization” section within the Service Authorization Request form indicating the change in funding source to expedite the review process.



VERY IMPORTANT

When a client loses their DMC eligibility, providers must enter the Coverage EXPIRATION date on the DMC guarantor to prevent billing denials.

Sage Form, Report, Widget Updates

County of Los Angeles Public Health

In Case You Missed It… Important Sage Updates

Name	New or Update	Description
LPHA Follow Up Assessment Worklist Report	NEW	The LPHA Follow Up Assessment Worklist Report was created to aid providers participating in the FY 26-27 Value Based Incentive for Workforce Development: Percent of Clients with Co-Occurring Mental Health Conditions Seen by LPHA (2-B) by identifying clients who need a follow-up with a diagnosing LPHA. This report looks at finalized ASAM CONTINUUMs completed in Sage as well as the Diagnosis form to create a “flag” on a report indicating the client should be seen by a diagnosing LPHA.
Discharge and Transfer Audit Report	NEW	The Discharge and Transfer Audit Report was developed to allow providers and SAPC quick visibility on Discharge and Transfers that have or have not been submitted. The report itself provides specific data points that are needed to track and update Sage-PCNX correctly, such as Admission Date, Discharge Date, Last Approved Date of Service for Level of Care, next Admission Date for Provider and Discharge/Transfer information.

In Case You Missed It… Important Sage Updates

Name	New or Update	Description
ROI for Payment and Operations Export	NEW	The ROI for Payment and Operations Export provides an aggregate list of all Payment and Operations (PO) records that were submitted electronically directly (not uploaded) in Sage
ROIs View	NEW	A new “ROIs” view was created so a client’s electronic release of information (ROI) records key fields are visible in one view. This view requires a client to be selected for the widgets to populate. If no client is selected, the widgets will be blank.
ROI for Payment and Operations Compliance Report	Update	Report is used to check compliance for obtaining the ROI for PO for all clients upon admission to treatment. Report is updated to include the program site the client was admitted to. This will help to track programmatic compliance.

In Case You Missed It… Important Sage Updates

Name	New or Update	Description
Accounting of Disclosures Log form	NEW	The Accounting of Disclosures Log is now available in LIVE and a Job Aid with instructions on how to complete the form can be found on SAPC's Sage-PCNX training page. The Accounting of Disclosures Log provides a template for tracking PHI disclosures in accordance with applicable regulations including HIPAA and 42 CFR Part 2.25. Under the Final Rule, it is required to keep an account of disclosures and make them available to clients when requested. SAPC is developing a report for providers to run that will populate with the list of recorded disclosures.
Medi Cal Eligibility Change Report	REMINDER	This report shows any changes in key eligibility fields over any 2-month period selected in the report parameters. The report contains data on the Aid Code, Eligibility Status Code, County Code and Resident County Code. If any of those items change, that client will populate the report for both months for providers to further investigate. The report is coded to only pull information on current clients with an approved authorization within 6 months of the date parameters.

Clinical Trainings

County of Los Angeles Public Health

SAPC | Substance Abuse Prevention and Control

CST Training Highlights

County of Los Angeles Public Health

Name of Training	Date & Time	Links
(NEW!) Supporting Whole-Person Care: DHCS-Required Changes for Care Coordination with Medi-Cal Managed Care Plans	Tuesday 11/17/2026 10:00am-12:00pm	Flyer Link
(NEW!) SAPC-UCLA Lecture Series Event: Emerging Drugs, Evolving Trends, and the Changing Substance Use	Friday 12/11/26 10:00am-1:15pm	*Flyer: coming soon*
(NEW!) Expanding Part 2 Compliant SUD Data Exchange: SAPC's ROI Forms	SAPC-LNC	Training Link
(NEW!) Primer on Part 2 & Final Rule Updates: SAPC Providers	SAPC-LNC	Training Link
Substance Use Recovery Oriented Housing: Assisting Our Neighbors Experiencing Homelessness	Thursday 11/12/26 9:00am-12:15pm	Flyer Link
Clinical Documentation for Substance Use Treatment Providers: CalAIM Requirements and Best Practices	Wednesday 11/18/26 8:30am-12:30pm	Flyer Link
Stimulants and their Impact on Brain and Behavior: Best Practices and Approaches for Effective Treatment and Recovery	Thursday 11/19/26 9:00am-12:15pm	Flyer Link
Involuntary Holds and the Expansion of Grave Disability (SB 43) in the Context of Substance Use Treatment	Tuesday 12/1/26 1:30pm-3:45pm	Flyer Link
Addressing Cannabis Use and Cannabis Use Disorders	Thursday 12/3/26 9:00am-12:15pm	Flyer Link

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