



# Communication Release

10/07/2024

## Document Routing and Appending Training

**Purpose:**  
 SAPC is excited to announce the Document Routing and Appending functionality is targeted to be implemented for productive use on Monday October 21, 2024. In preparation for these new features, SAPC is holding a training on Tuesday 10/15/24 to demonstrate the new functions. This training was originally held at the end of June, however, we are offering this training as a refresher and update as there are some additional features and workflow considerations since the previous training.

Document Routing will allow users to send (route) certain forms/documents to a supervisor or approver for finalization and signature. Additionally, Appending documents will allow providers to update parts of the medical record with additional information that occurred after a note was finalized without needing to revert from final to draft.

This training will review and demonstrate both of these exciting new functions, along with policies, procedures, and suggested workflows.

**Who Should Attend:**  
 This training is intended for all Sage users that enter clinical documentation, supervisors, and quality assurance team members at each agency.

**Training Details:**  
 SAPC will offer this virtual training via Webex Webinar. Following the interactive training, a separate recording will be created and shared on the SAPC website. **REGISTRATION IS REQUIRED.** The login is unique and should not be shared with others.

**Trainers:** Daniel Szuhay, Psy.D.

Training Date	Training Time	Registration Link	Flyer Link (more info)
Tuesday, October 15, 2024	10:00 am - 12:00 pm	<a href="#">Register Here</a>	<a href="#">Flyer Link</a>

## Document Routing and Appending Updates

**Document Routing** is a specific function that allows the author of a document to finalize enabled forms, as configured by SAPC, and route or forward the document to a supervisor for final signature. It is the supervisor's signature that makes the document officially final and valid. Document Routing allows for a more efficient approval workflow for a supervisor's co-signature/approval, or other reasons why the author of a document may want their document reviewed. Document Routing status can be either Final (accepted and signed by the approver/supervisor), Pending (pending review from the approver/supervisor) or Rejected (reviewed by the approver/supervisor and returned to original author for corrections). Rejected documents are automatically placed in draft status to allow for the author to make necessary changes.

The **Append Document** function will allow providers to add, edit and/or correct a finalized document's permanent record without having to "Final to Draft" the document. However, if the appended correction will impact claiming of the service, such as the date of

service or duration, those changes will still require the Final to Draft workflow as appended notes will not populate to any of the reports used for billing.

The following forms will be Document Routing and Append enabled:

1. Discharge and Transfer Form
2. Drug Testing
3. Patient Medications
4. Problem List/Treatment Plan
5. Progress Note
6. Recovery Bridge Housing Discharge
7. Referral Connections
8. Service Connections Log
9. Youth and Young Adult Screener

Additionally, the Progress Note Status Report and Documents Requiring Co\_Signature report will be updated for increased visibility on documents that have been routed and their current routing status.

With these changes, the Documents Requiring Co-Signature report has been renamed to more accurately reflect the function of the report. The **Documents in Draft and for Co Signature Report** (formally titled Documents Requiring Co-Signature) captures documents that are currently in draft as well as documents that require an action by a supervisor. This report lists Progress Notes, Discharge and Transfer Forms, Recovery Bridge Housing Discharges, Drug Testing forms, and Patient Medication forms. Filters have been added to allow the user to limit the responses based on whether the document has been 1) left in draft, 2) left in draft and the “ready to submit” option was checked (indicating need for LE-LPHA/LPHA to review and finalize), 3) routed for signature and is pending approval, 4) routed for signature but rejected by the supervisor. There are some limitations to the report that will be discussed in more detail during the Document Routing training.