



# Sage Notification: Document Routing and Appending Updates

10/22/2024 @ 3:00pm

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Dear SAPC Treatment Providers,

SAPC officially released the Document Routing and Appending functionality within the Sage-PCNX system on Monday 10/21/2024. During the initial hours of implementation, users experienced some errors with the Progress Note Status Report and the newly created Documents in Draft and for Co Signature report (formerly Documents Requiring Co\_Signature Report).

SAPC worked with Netsmart to resolve most errors in a timely fashion. The Progress Note Status Report errors related to the Draft status not displaying correctly and the export functionality were both resolved on 10/21/2024.

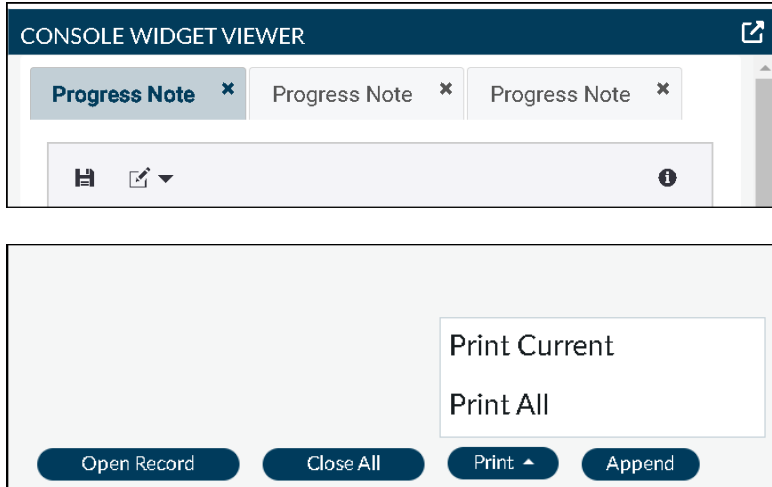
The Documents in Draft and for Co Signature report issue where it was not running correctly was resolved as well. SAPC has also noted an error on the Drug Testing section of this report that is currently being investigated by Netsmart. While we do not have an estimated resolution time, the remainder of the report has been validated and is working correctly. Providers can use this report to identify whether the Progress Note, Patient Medication, Discharge and Transfer Form, and/or Recovery Bridge Housing Discharge forms are either in Draft status, Draft- Ready to Submit, Routed for Approval or Routed and Rejected. The Drug Testing section is not currently functional and should be ignored until further notice.

Since implementing these new functions, SAPC has received feedback from providers related to printing the new document image format within Sage-PCNX from the All Docs/Chart View. SAPC would like to remind providers that clinical documents are not required to be printed and stored in a paper chart, by either SAPC or DHCS. Forms that require a patient or provider signature are viewable within Sage-PCNX by SAPC staff and outside auditors when granted access to the system. Sage-PCNX displays the electronic signature and required date/time of the signature on the document images from the All Doc/Chart View or the Client Dashboard Console Widget Viewer. Documents finalized prior to Document Routing are also acceptable forms of electronically signed documents. Neither SAPC Utilization Management nor Contract Provider Auditors require any form to be printed to view the signatures if created directly in Sage-PCNX.

Providers can utilize the Progress Note Printout or Problem List/Treatment Plan Printout to save digital copies with the additional electronic signatures as needed. SAPC is creating additional printout versions of the other various clinical documents for similar purposes. However, if any clinical documents are needed to be printed or digitally saved with the official electronic signature line for external audits,

providers should contact their assigned CPA, who will verify that request and provide a standardized digital version of the requested forms for saving or printing.

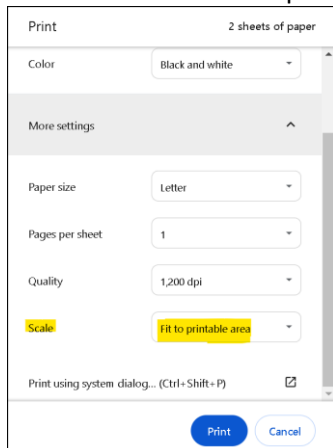
Providers are able to print the image of the finalized document directly from the Console Widget Viewer on the All Docs/Chart view or the Client Dashboard by selecting either the Print Current or Print All buttons. Print Current refers to printing only the document that is being displayed on the screen where Print All will print all the loaded documents as seen by multiple tabs being open in the widget.



When printing from a browser, the user may need to adjust their print settings depending on the browser and the print defaults.

In Google Chrome,

1. Select More Settings
2. Click on the "Scale" dropdown option and select "Fit to printable area"



In Microsoft Edge,

1. Select More Settings



2. Click the “Fit to printable area” button under Scale (%)

The screenshot shows a settings panel with the following elements:

- A link at the top: "Fewer settings ^"
- A section titled "Paper size" with a dropdown menu currently set to "Letter".
- A section titled "Scale (%)" containing three radio button options:
  - "Fit to printable area" (highlighted in yellow)
  - "Actual size"
  - "100" (with a text input field next to it)

As a reminder, Document Routing is an optional feature that SAPC believes will improve provider workflows when documents are needed to be co-signed or reviewed by a supervisor or LPHA rather than manually searching for those documents. However, we understand that some providers have different workflows and may not be able to immediately take advantage of this functionality. As such, the previous workflow of selecting the “Draft-Ready to Submit” checkbox and leaving the form in draft is still available and will not be removed as an option for those providers where Document Routing is not an option.

The following resources are currently available on the SAPC Sage website to assist providers incorporate Document Routing and Appending into their workflows.

Name	Description	Link
Sage-PCNX Document Routing and Appending Job Aid	This Job Aid will review the Document Routing and Appending functions in Sage-PCNX.	<a href="#">Sage-PCNX Document Routing and Appending Job Aid</a>
Sage-PCNX Guide to Widgets	This guide describes all the widgets that are available within Sage-PCNX and details their functionality (e.g., intended use) to help providers efficiently access form data within the application.	<a href="#">Sage-PCNX Guide to Widgets</a>
Sage-PCNX Guide to Reports	This guide provides a listing of available reports to providers. It explains the parameters, report output, and how to export.	<a href="#">Sage-PCNX Guide to Reports</a>
Document Routing and Appending webinar recording	Recording of the training given to providers on 10/15/2024	Anticipated to be available on the Sage PCNX Trainings page by week of 10/27/24