SAPC | Substance Abuse Prevention and Control

sage

SUD Electronic Information System

PCNX Navigation Guide

This Navigation Guide provides an orientation to the PCNX layout as well as a general description of PCNX navigation functionality.

Please note that snips are taken from a test environment and no PHI is shared.

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County of Los Angeles Public Health

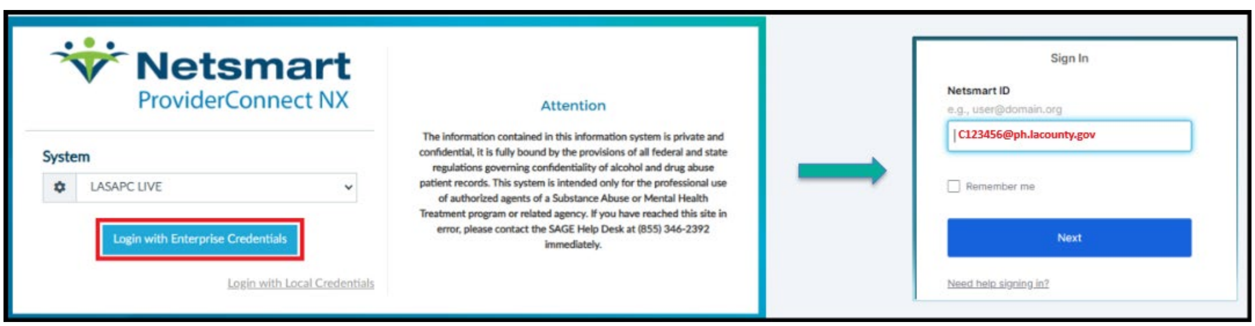
Sage Access

Providers have access to two (2) environments, LIVE and TRAIN. LIVE is the environment in which real patient information and services are documented. TRAIN is used exclusively for onboarding, learning, and practicing within the system in a non-production environment. No Protected Health Information (PHI) or real patient information should ever be entered into the TRAIN environment.

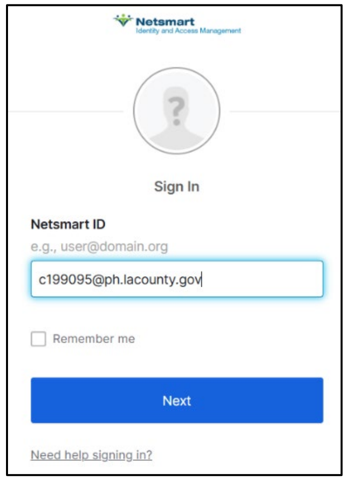
Once approved for SAGE access, users will receive a LIVE and TRAIN URL for log in. Providers will be configured to “Login with Enterprise credentials” which requires multi-factor authentication (MFA) via the Microsoft Authenticator App, accessible via a personal cellular phone or business cellular phone. The Authenticator App process is set up when users register their C number (c#) by completing the necessary steps on the Sage User Enrollment Page (these steps must be followed before users can access Sage). For assistance with the enrollment process, providers should contact sageforms@ph.lacounty.gov.

Log In Procedures

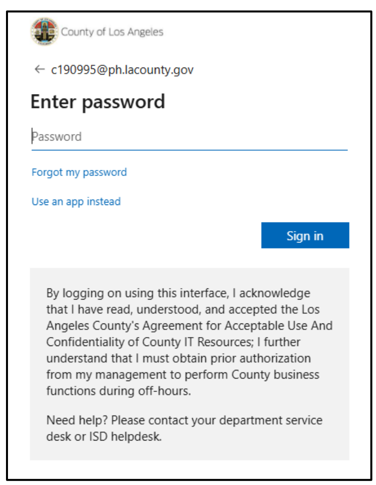
1) Click “Log In with Enterprise Credentials.”
2) Enter the user Netsmart ID in the pop-up window in the Netsmart ID box to authenticate to the network. Users will always use their c# in email address format (c#@ph.lacounty.gov) as their Sage Netsmart ID when logging into Sage-PCNX.
3) Once the c#@ph.lacounty.gov email address is entered click Next, which will prompt the authentication process for the County. Authentication will be done once a day when logging into the Sage environment.



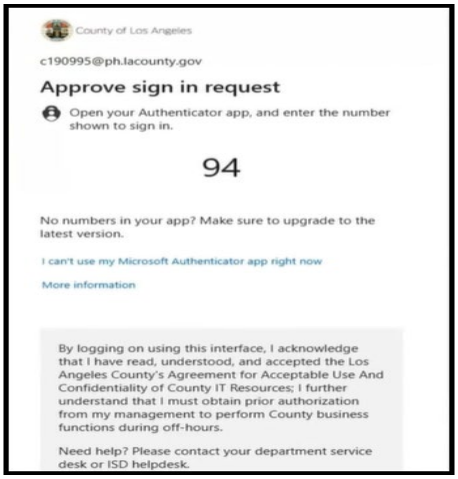
4) Authenticate via Multifactor Authentication (MFA). Enter the c#@ph.lacounty.gov email address again and click Next.



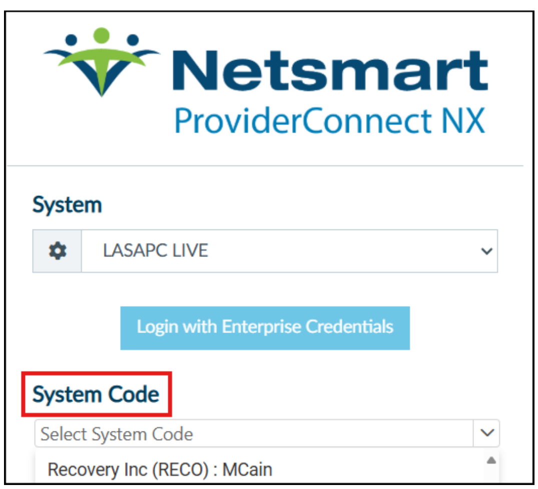
5) Enter the password for the c#@ph.lacounty.gov email address created during the C# registration process.



6) Users will see a number on the Microsoft Authenticator application; enter the number on the screen to authenticate.



7) Once verified, select the four-letter System Code for the user agency, which is available using the drop-down arrow.



System Information

System refers to the environment. For providers, this will either be LASAPC TRAIN (i.e., The TRAIN environment) or LASAPC LIVE (i.e., the LIVE/production environment).

System Code is a combination of an agency specific 4-digit prefix which ensures users only have access to data for their agency. Providers will be notified of their system code which will be comprised of a four (4) letter identifier associated with their agency. Users will only have access to the system code with which they are associated. For example, Recovery Inc would have a System Code of RECO.

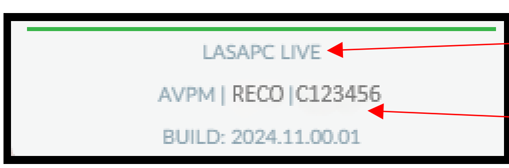
> **IMPORTANT***** All users will have a “PCNX” system code available, however this will not provide access to agency pertinent information. Users should <u>**NEVER**</u> select the “PCNX” system code. It is there for configuration reasons only. Users should only select the system code with their agency name and code listed.

For users who work at multiple agencies, multiple system codes will be displayed. Please carefully select the correct system code when logging in.

When logged into the system, identifying Information can be found along the left-hand panel and will include:

a. Name of logged in user in the upper left-hand corner.

b. Environment type, agency system code and user’s C# in the lower left-hand corner.



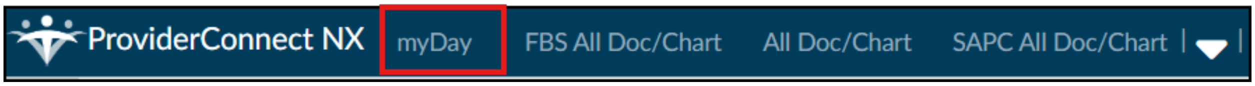
Shows the LIVE environment.

RECO - Agency’s system code used to limit the user’s access to only that agency’s patients.

C123456 – the user’s login ID to MFA. May be requested when troubleshooting issues within Sage.

Log In Views

Once logged in, users will default to the home page and **myDay** view, which is similar to the log in view shown below.

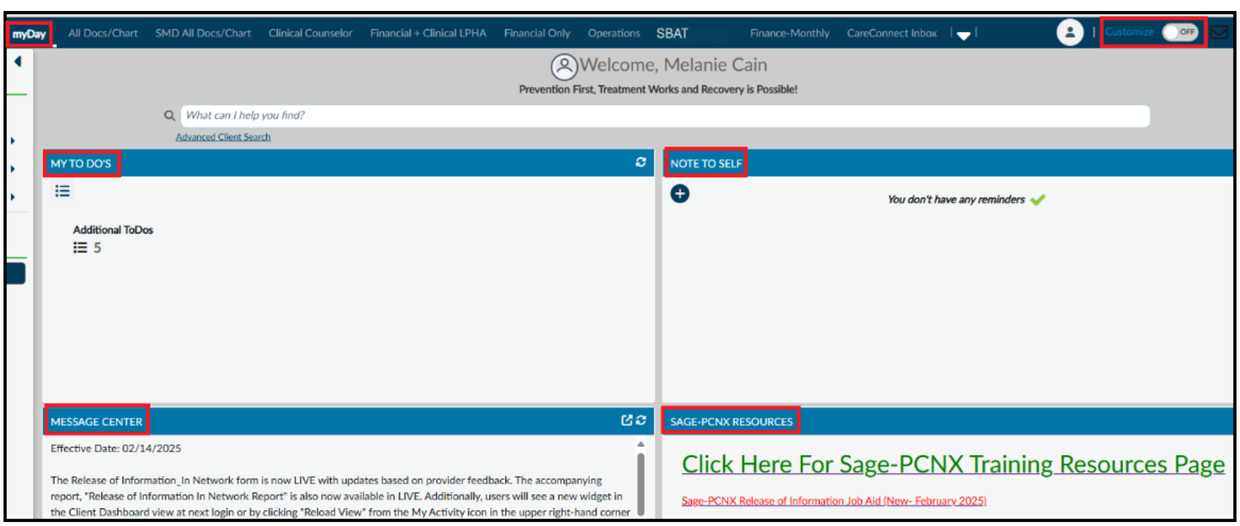


Views are a collection of widgets that display various types of information including summary information for an agency, a selected patient, or aggregate analytics for program operations.

A user's available views are displayed across the top of the screen and are assigned based on user roles. In addition to the myDay view, most users will have the All Docs/Chart view, SBAT view, and KPI Dashboards view.

myDay

This is the default view for all users. The **myDay** view is updated regularly with important messages from SAPC regarding Sage, Sage Training Guides, and other pertinent information for users.



Please note, the "Customize" feature noted on the blue ribbon in the upper right-hand side has been disabled to ensure a uniform experience for all PCNX users and to enable the Sage Help Desk agents to be able to assist the user directly.

Default View Widgets

The default myDay view includes four (4) widgets:

1) MY TO DO'S
2) NOTE TO SELF
3) MESSAGE CENTER
4) SAGE-PCNX RESOURCES

Note: All widgets may be undocked by clicking on this icon or refreshed using this icon .

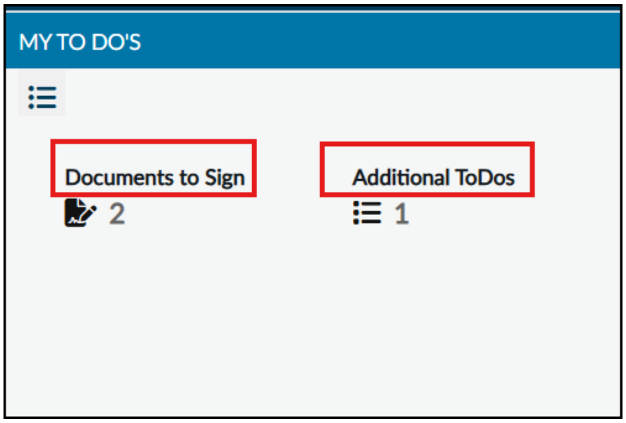
MY TO DO's

The MY **TO DO's** widget will provide the number of forms which are in Draft status and need to be finalized and the number of forms that have been routed to the user and need approval signature or co-signature.

MY TO DO's are viewable in the myDay view and are categorized into:

- **Documents to Sign**
  These documents are pending review and signature. Generally, this is for supervisors who have documents forwarded for approval or review.

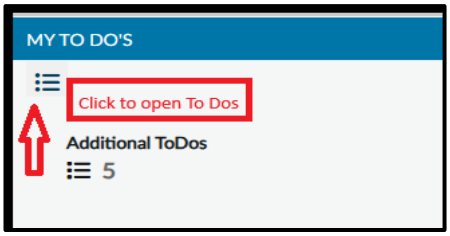
- **Additional To Do's**
  The Additional To Do's section provide a listing of all forms which are currently in Draft form status. To view all forms in Draft status, users may click anywhere on the widget.



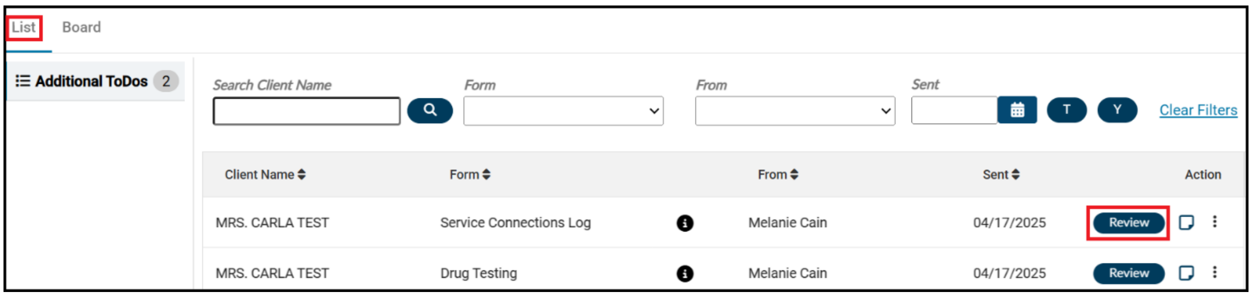
Please note, MY TO DO'S are also available in the My Activity Panel which is discussed later in this guide.

To access MY TO DO'S from the MyDay view widget, click on the three dots and three lines underneath the MY TO DO'S text. This will take the user to the List Option.

In the example below, the user has 5 Additional TO DO'S:

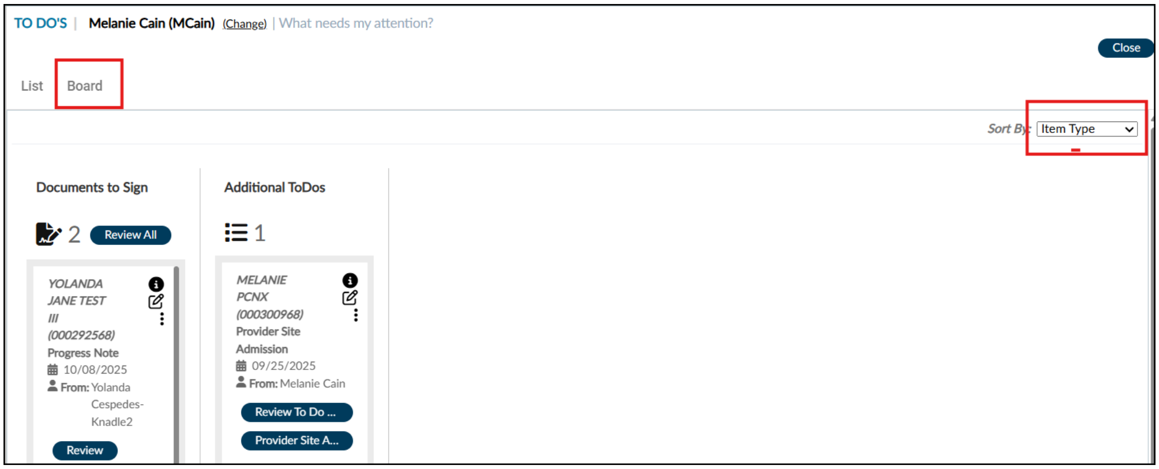


List View. The List option allows providers to see all clients and To Do's in a vertical format. To narrow down the search, providers may enter the name of the client. If there are multiple forms open for one client, the search may be further narrowed by entering the name of the form, the provider who completed the form, and the date the document was finalized. There is a review button for documentation viewing which will allow the user to open the record and finalize or approve a document.



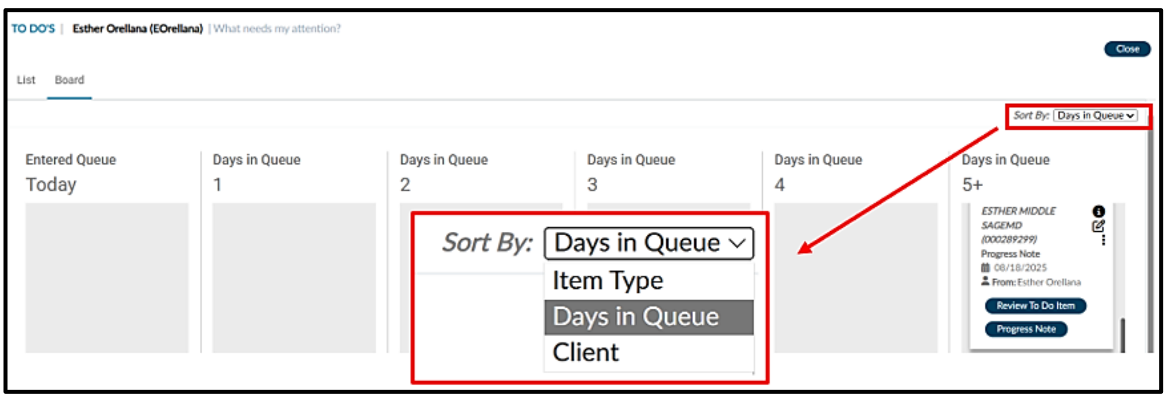
Board View. The Board option allows providers to use the Sort By drop-down menu, located in the upper right-hand corner of the widget. This drop-down menu will sort the

To Do’s list by either **Item Type, Days in Queue, or Client name**.

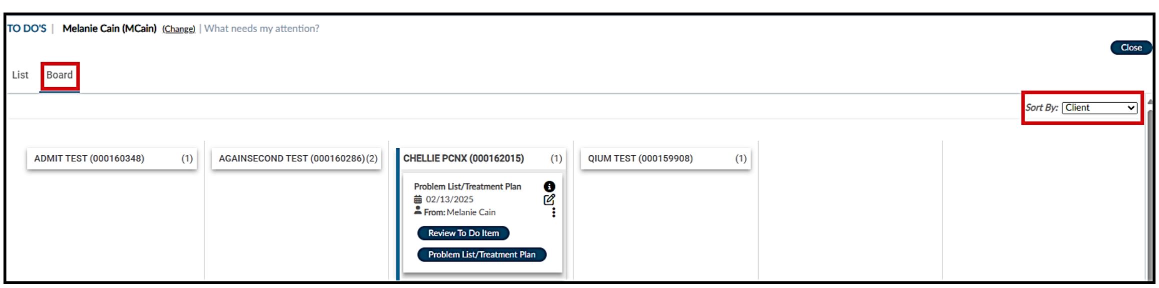


Item type – This view allows the provider to see each To Do by the name of the activity.

Days in Queue - This view can be used by the user as a method of compliance monitoring to ensure documents are finalized within appropriate timeframes.

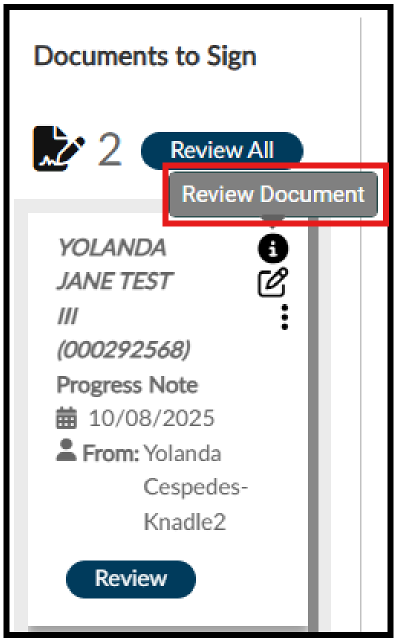


Client - This view will allow the user to view client documentation by each client’s name.

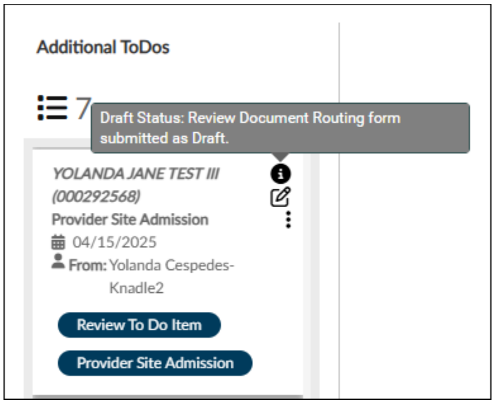


COUNTY OF LOS ANGELES Public Health

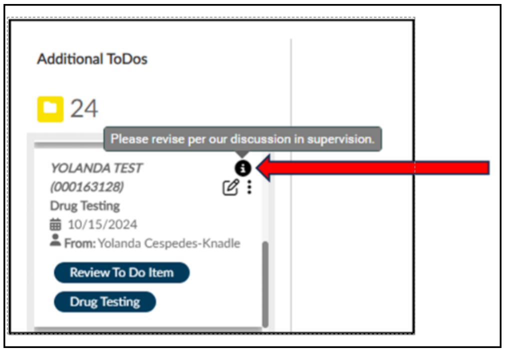
Documents to Sign
Lists which documents require signature. Hovering over the lower case "i" in the upper-right hand of each document listing will prompt a message, "Review Document," which indicates the document is pending review and signature.



Additional To Do's
To quickly determine whether the form was left in Draft status (by the user) or whether it was routed and rejected (by a supervisor), hover over the lower case "i" in the upper right-hand corner. If the document was left in Draft, it will read "Review Document Routing form submitted as Draft."

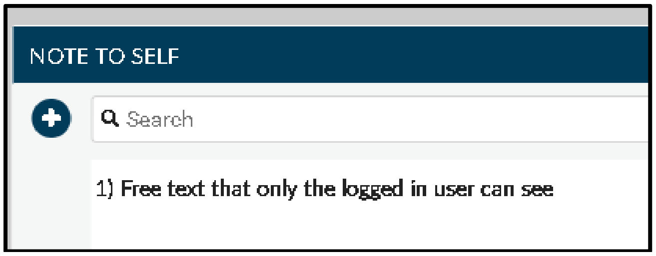


If the document was rejected by a supervisor, this will be indicated in the comments.



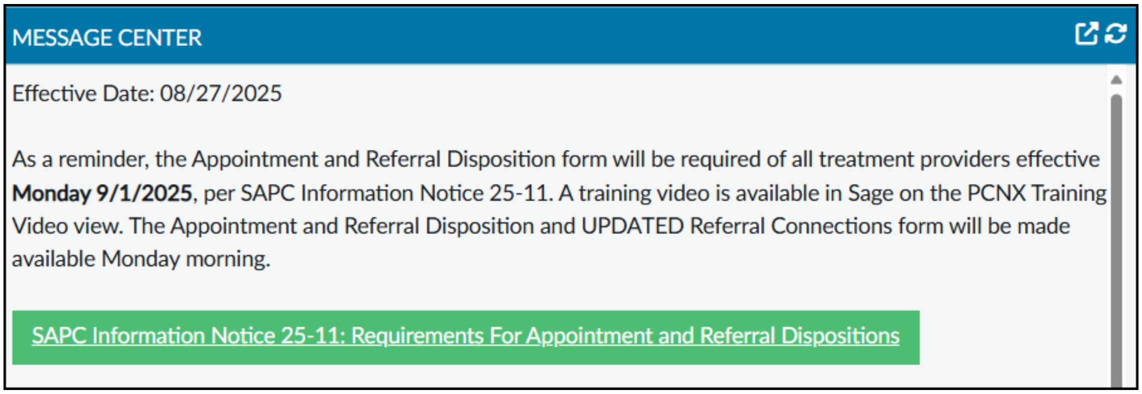
NOTE TO SELF

This widget in the myDay view allows users to create notes to themselves which are only visible to the logged in user. The note can be edited and deleted when completed.



MESSAGE CENTER

This widget in the myDay view provides important information pertaining to releases, updates, etc. within PCNX. These messages are updated by the Sage Management Team and cannot be edited or deleted by end users. Messages will be updated periodically and as needed, so there may be occasions where this is blank.

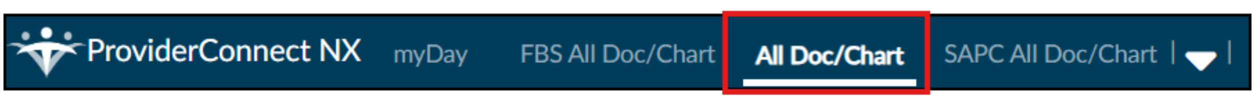


SAGE-PCNX RESOURCES

This widget in the myDay view displays functional links to written PCNX resources from the Sage website which open in a separate browser when clicked. Links will be updated as material is created and/or updated.

All Doc/Chart

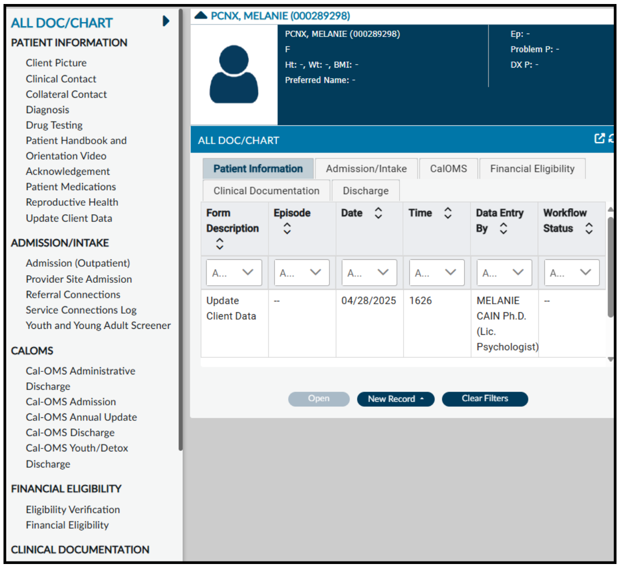
The All Doc/Chart view may be found by selecting the All Doc/Chart view displayed at the top of the screen.



This view is a compilation of the majority of patient forms. For clinical staff, this is where most of the work will be completed. In the middle of the All Doc/Chart view is a widget which is a compilation of different forms. Form categories include – Patient Information, Admission/Intake, CalOMS, Financial Eligibility, Clinical Documentation, and Discharge.

Forms displayed within each category are in either Draft or Final status and may be previewed or printed. New records may also be completed from this widget.

When a patient is selected this widget will populate all the forms associated with that person, within the selected tab. For instance, in the example below the mock patient is Melanie PCNX, PATID #289298, and the Update Client Data form is displayed.

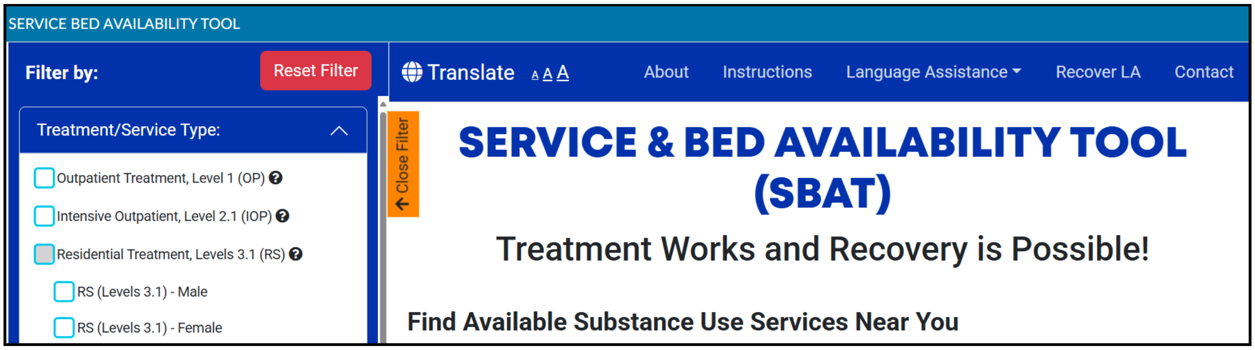


Each column is filterable by Form Description, Episode, Date, Time, Data Entry By, or Workflow Status, i.e., Draft or Final, as applicable. At the bottom of the widget users may Clear Filters, create a New Record for the selected patient, or Open up the record. The available record options will be limited to the forms associated with the tab currently selected.

It is recommended that users click “Enable Customization of Documentation View” in the Preferences menu to allow users to resize the widgets in this view. For instructions on how to enable the customize tab for this view, see Preferences in the User Menu section later in this guide. Customizing will allow users to resize the two widgets on the view for improved readability.

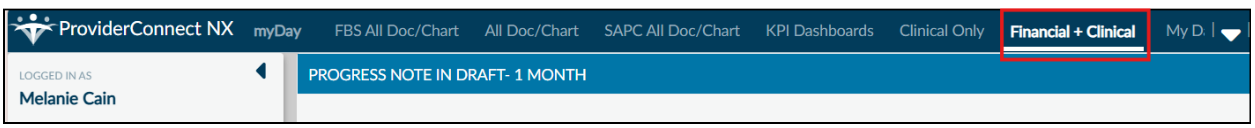
SBAT

This view provides a direct link to the Service Bed Availability Tool (SBAT). Additionally, in LIVE, this view is linked to the SBAT login so authorized users can update the SBAT in real time.



Financial + Clinical LPHA (Sample View)

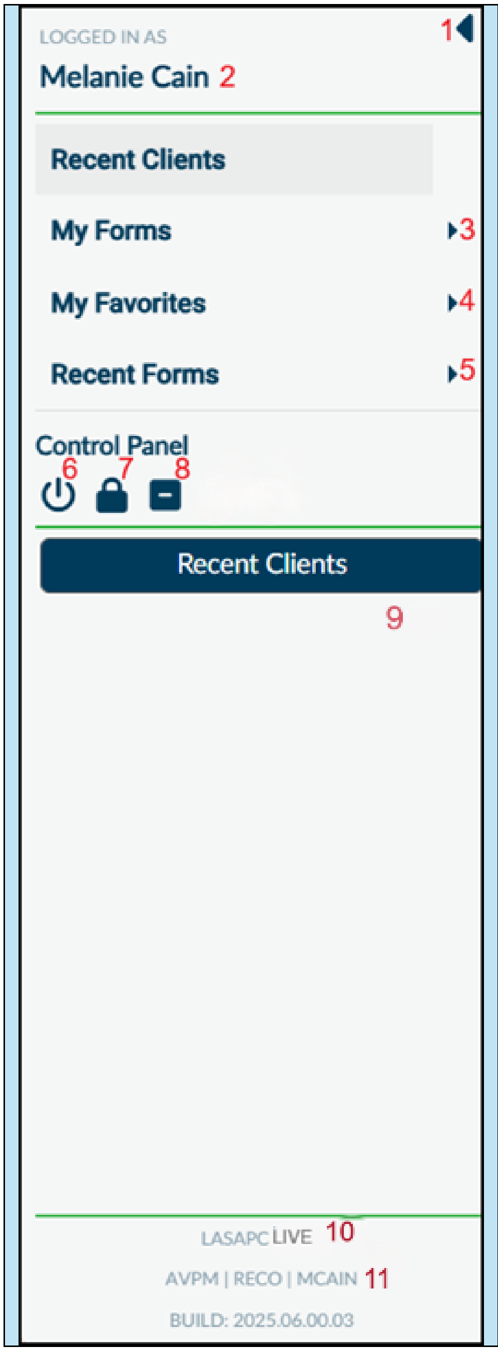
The Views that a user has access to will be determined by their assigned user role(s). For instance, if a user should not have access to billing information, then the Views assigned to them will contain widgets that are limited to clinical information and exclude billing information.



Note: Financial + Clinical LPHA is used as a sample view for this guide. Financial + Clinical LPHA combines clinical widgets with billing widgets. Users should expect to see a view that matches their user role within Sage.

Control Panel

The **Control Panel** on the left-hand side of the screen has numerous functions.



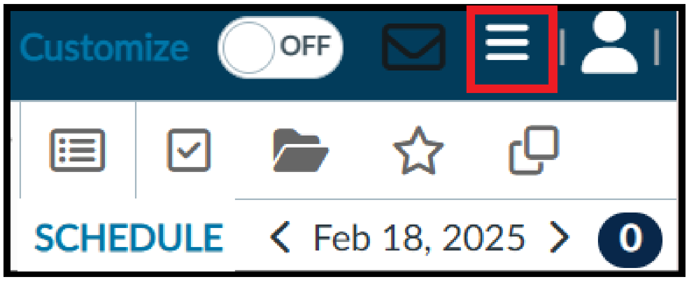
1. The **dark blue triangle** icon to the right of LOGGED IN AS will hide the control panel.
2. **LOGGED IN AS**: The name of the user logged into Sage.
3. **My Forms:** Provides a listing of all forms associated with a user role.
4. **My Favorites:** A user configurable section. “Edit Favorites,” allows forms/reports to be added and/or removed. Use the “Add to Favorites” button in forms to add to this section.
5. **Recent Forms:** Lists forms and/or reports opened in the login session.
6. **Logout:** A quick way to log out of the environment.
7. **Lock Application:** When stepping away from the application, clicking on the Lock will require the user to reenter their Enterprise credentials and keep them logged in to the session.
    a. Users should ALWAYS lock the application when stepping away from the computer to ensure HIPAA compliance.
8. **Close All Open Forms:** Closes out all open forms and reports.
9. **Recent Clients:** A listing of all clients selected during the session, which resets after each session.
10. The environment, LIVE or TRAIN.
11. The first section, AVPM is Standard. The second section identifies the system code typically, the first 4 letters of the agency name. The third section refers to the username log in.

My Activity Panel

The **MY ACTIVITY PANEL** is located on the right side of the screen and is comprised of five (5) sections:

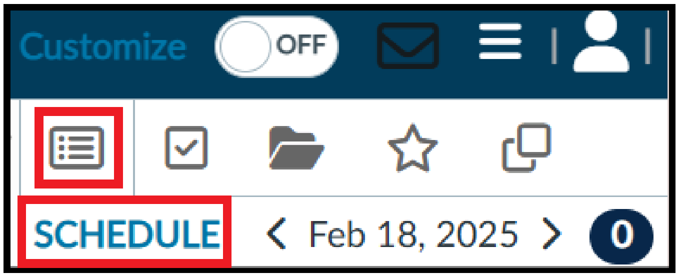
1) SCHEDULE
2) TO DO's
3) CURRENT ACTIVITY
4) Edit Favorites
5) Reload View/Add Widgets to View

Note: Customize and Envelope are currently disabled for providers.



SCHEDULE

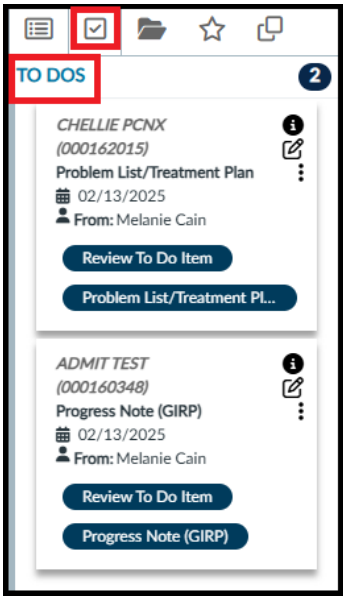
This will show today's date



TO DO'S

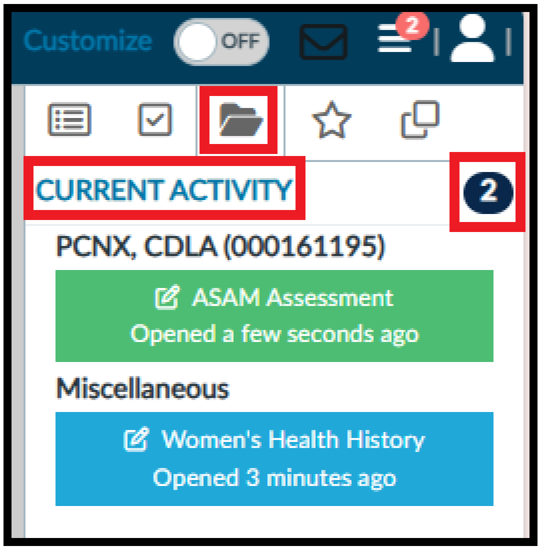
This section is linked to the number of items in the TO DOs Widget in the myDay View and will show a listing of all documents in My To Do's.

In the example below, the number “2” refers to the number of items in draft or documents requiring signature.



CURRENT ACTIVITY

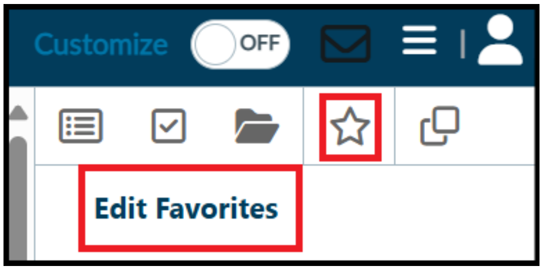
This indicates open items, including forms, reports, or patient records. The number notes the number of items open, in this case two (2), a patient and Miscellaneous form. This is also noted on the My Activity icon if this panel is closed.



Edit Favorites (Star Icon)

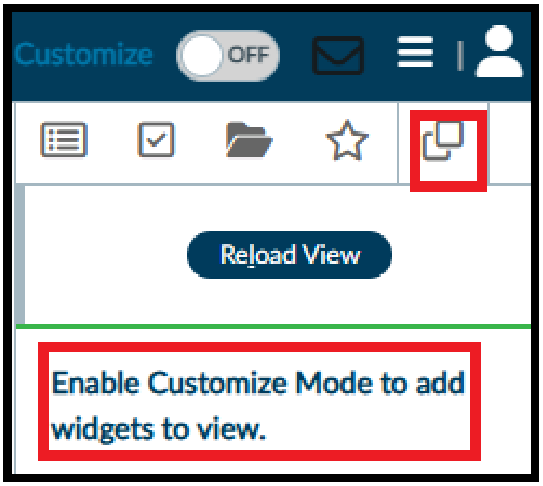
This is customizable by clicking Edit Favorites, entering the form or report the user would like to add, saving this form, and then viewing this form in the My Activity Panel or My Favorites section in the Control Panel.

Recommended documents to be added to Favorites include those not generally displayed on the All Docs View, i.e., Reports or ASAM Assessment.



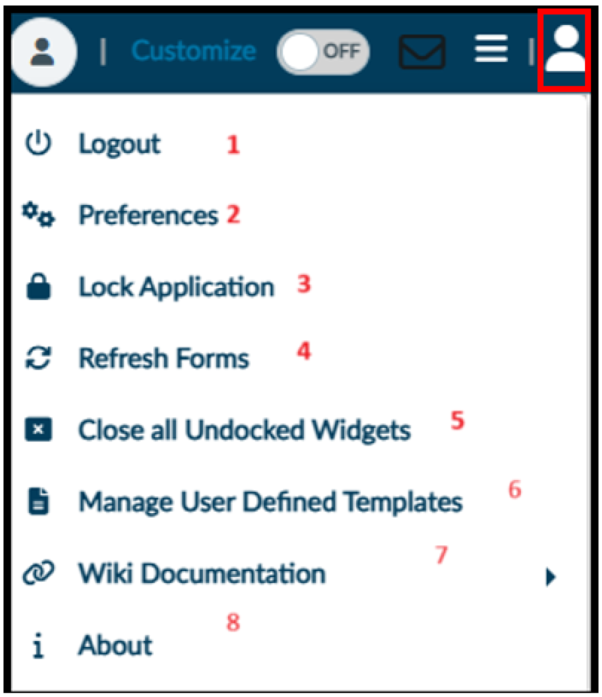
Reload View/Add Widgets to View (Double Square Icon)

This will refresh the view. Users are unable to add widgets themselves.



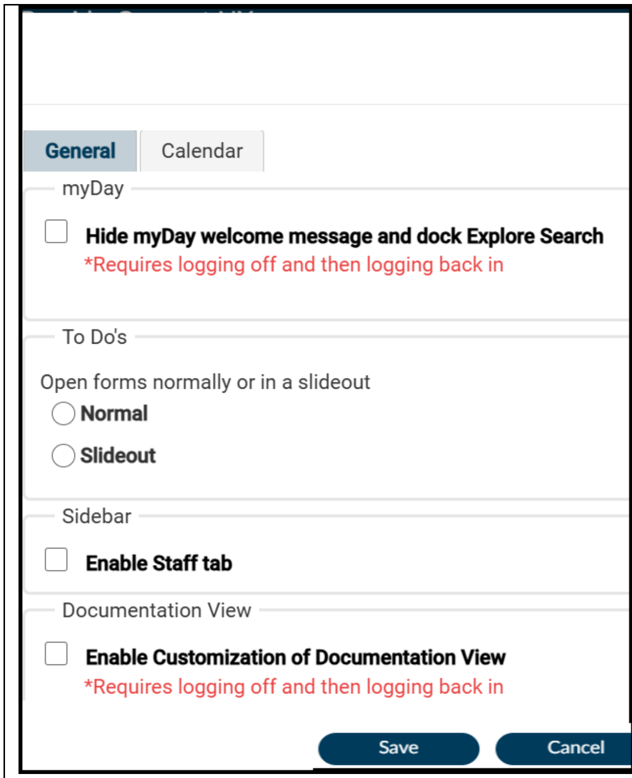
User Menu

The **User Menu** icon is the person icon which provides quick actions and options for navigating the system.

 	1) **Logout**: Clicking this will log the user out. 2) **Preferences:** This feature will be discussed further in the table below. 3) **Lock Application**: This quickly locks the session. 4) **Refresh Forms:** Refreshes forms that are not open. If a form is open, the form will remain the same. 5) **Close all Undocked Widgets:** This closes the widgets that were undocked in different browser windows. 6) **Manage User Defined Templates:** Allows creation of free text on certain forms. 7) **Wiki Documentation:** Unavailable to SAPC network providers. 8) **About**: Provides information about the NX Netsmart product.

Preferences

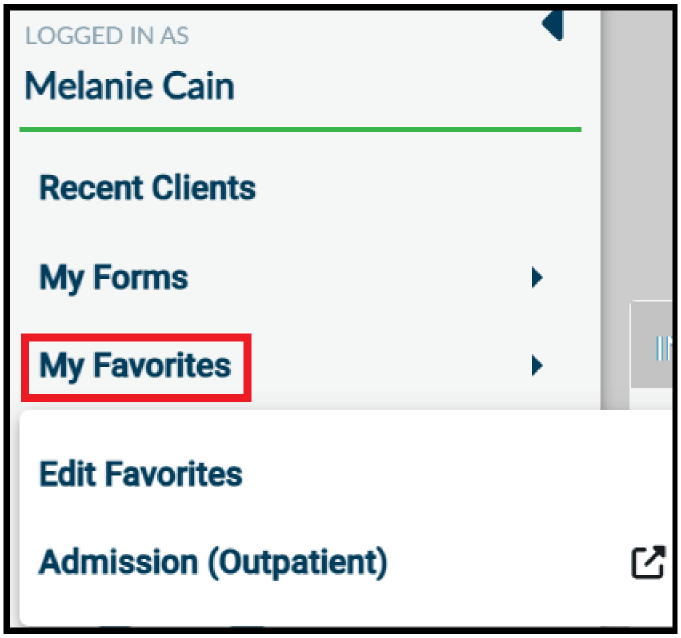
Preferences are viewable in the General tab. **Preferences** enables customization of the user experience. Only items in the General tab can be customized; the Calendar tab is not configured for SAPC provider use.



1) **myDay:** When users check the Hide myDay box, the Search Bar will only be visible **on the left-hand panel.**
2) **To Do's**: This option allows for the To Do's widget to slideout (Slideout) or be available in the patient's chart (Normal).
3) **Sidebar:** SAPC does not recommend enabling the Staff Tab; please use the Smart Search bar as there is no current functionality for providers.
4) **Enable Customization of Documentation View**: Allows users to customize the All Doc/Chart View. If not checked off the view will default to the screen size. SAPC recommends checking this option to allow the individual user to resize the widgets on the Documentation View, which is labeled as "All Doc/Chart."
5) Click **Save** to save your changes or **Cancel** to return to the main screen.

My Favorites

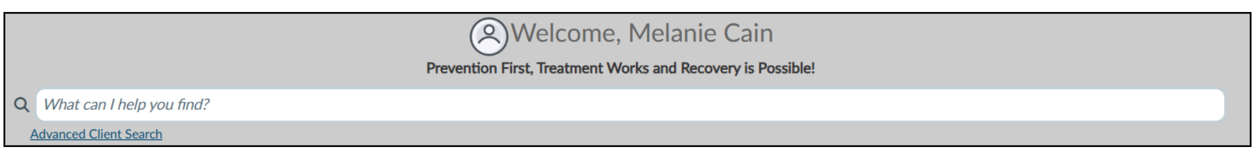
Using the My Favorites option in the Control Panel is a way to have the most utilized forms and reports accessible without having to use the search bar.



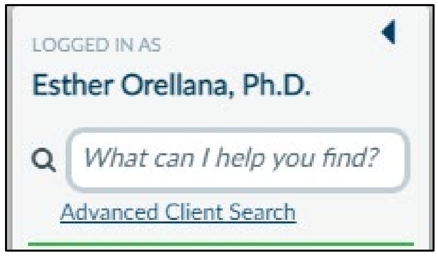
Navigation– Smart Search

The Smart Search bar is a Sage-PCNX feature that allows the search of patients, forms, reports, and staff. By entering the exact name or partial name, the smart search bar will return and categorize results.

From the myDay View the Smart Search bar is located at the top of the screen.

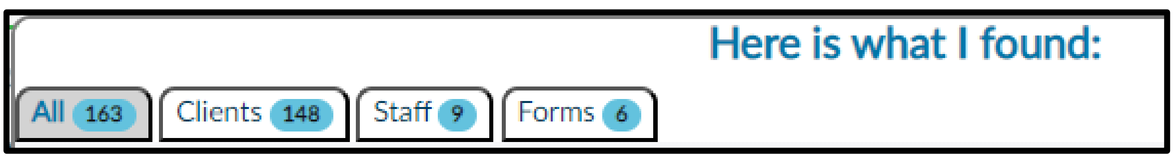


In all other views, the Smart Search bar is embedded in the left-hand Control Panel.



Spelling is important in the search bar. Incorrect spelling of a word may affect the results. If there is a typo, the search may not be complete or yield any results. To search for a patient, the user may enter the patient's Last Name, First Name; Date Of Birth; Client Index Number (CIN); or Social Security Number.

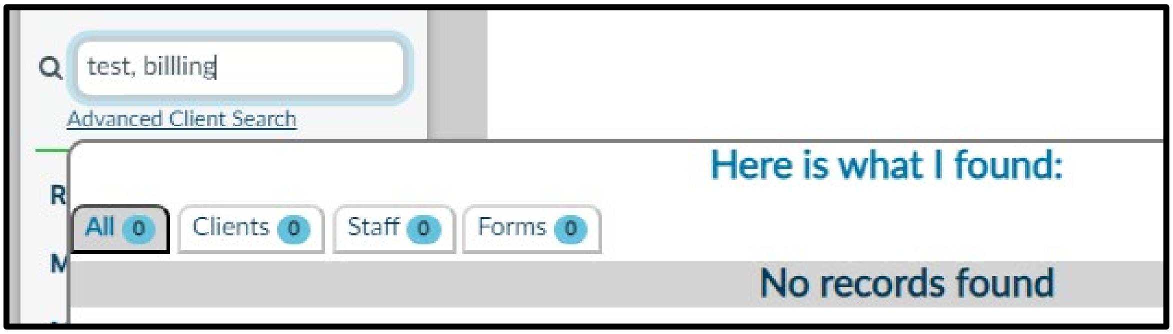
Example: If the search is for the patient "Billing Test" and "test" was entered into the smart search bar, the result would yield 148 different patients in which part of their name included "test." Additionally, nine (9) staff also included "test" as part of their name. Lastly, six (6) forms returned with some part of the name to include "test."



Note: The "Forms" tab includes forms and reports.

If the search was expanded to "Test, B", the results are more targeted.

When an incorrect spelling is searched, i.e., in this case adding an extra “L” to “Billing”, the result yields no records.



Form And Report Search

When looking for a form, type in the form name in the search bar. Once the form opens, clicking Discard will allow users to exit out of a form without saving any changes.

TIP: If unsure of an exact name, type only one word that is sure to be correct. Users will then be able to scroll to find the correct item.

There are multiple factors to consider when using forms and reports.

1) When searching a form, if a client’s name is highlighted within the Recent Clients section the form will prepopulate with the client’s information and the form will open with the patient’s name in the header.
    a. Users can cancel or discard the form if a patient was inadvertently selected.
2) If a form or report is used often, users have the option to use the “Add to Favorites” button to the right of the form or report name, which will add the form or report to your favorites.
3) If a particular form has a printout or report with a similar name, i.e., Service Connections Log and Service Connections Report, when searching the name “Service Connections” both the form and report options will be displayed. The user will have to discern which form, printout, or report is needed.

4) Click Discard to exit the form or report.

service connection

Advanced Client Search

Here is what I found:

All 4 | Clients 0 | Staff 0 | Forms 4

Forms		
Undock	Name	Menu Option
	Service Connections Log	/ Avatar PM / Assessments
	Service Connections Log Printout	/ Avatar PM / Assessments / Reports

Practitioner Staff Search

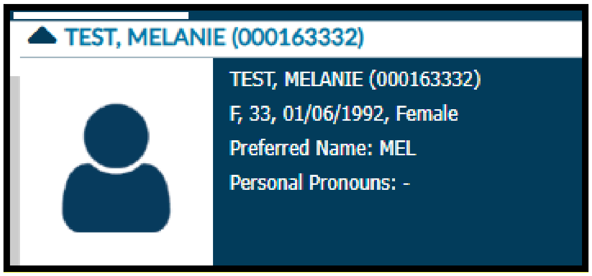
Managers or supervisors may use the same search bar to verify practitioner configuration in Sage. For configured practitioners within Sage, staff will be displayed as shown in the example below. The first Practitioner Category column provides the staff name, staff number, and credential. The second Practitioner Category column provides the actual Practitioner Category. While the third column is the National Provider Identifier (NPI), a10-digit standard unique health identifier for health care providers. The fourth column is the Taxonomy Code which is used to classify different types of healthcare providers.

Staff			
Practitioner Category	Practitioner Category	NPI Number	Taxonomy Code
JOY PCNX Ph.D. (Lic. Psychologist) (008359)	Licensed Clinical Psychologist (LCP)	1579868732	103T00000X

If any information is missing, those fields will be blank, which would require a Sage Help Desk ticket to update the missing information as appropriate.

Navigation - Patient Name

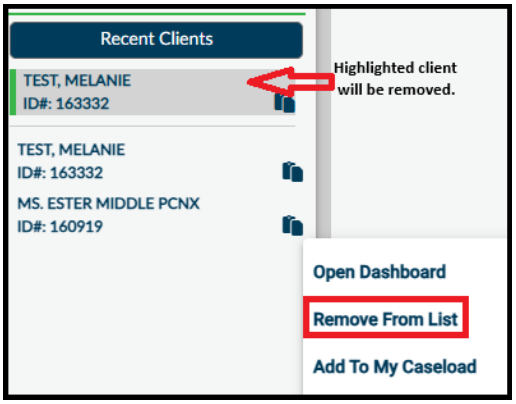
Patients will show up on the blue ribbon at the top of a chart, which is the Patient Header, with demographic and contact information.



Recent Clients

Once a patient is selected, they will show up on the left-hand panel under Recent Clients. The name that is highlighted in gray is the patient who is currently selected and whose record is being viewed. This patient will be separated from other patients in the Recent Clients list by a thin gray line. The Recent Clients is cleared out each time the user logs out of Sage-PCNX. Patient names will not be saved for the next time Sage-PCNX is accessed.

If the patient list gets too long, users may right-click on the patient's name and "Remove From List."



Client Dashboard

The Client Dashboard is a feature comprised of various widgets based on form entries including Diagnosis, ASAM Finalization, and Financial Eligibility and is accessible in one of two ways.

1) Recent Client list
2) Default View
3) Dashboard View

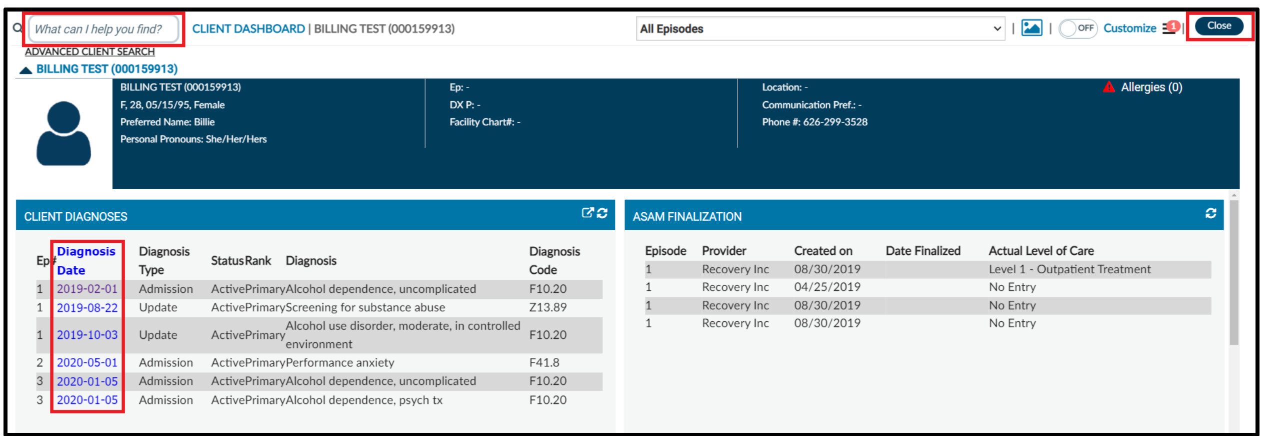
Recent Client List

To access the Client Dashboard from the Recent Clients tab, hover over the clipboard icon to the right of the name which will prompt the Open Dashboard prompt providing access to the dashboard.

Default View

To access the Client Dashboard from the Default view, clicking on the name of the client displayed at the top of the view will open the Client Dashboard.

Dashboard View

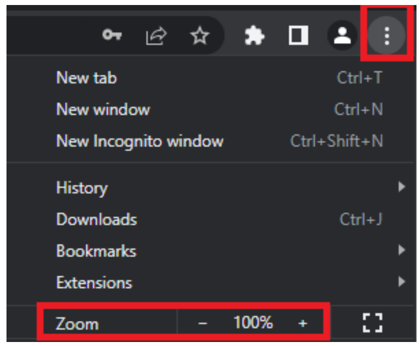


On the Client Dashboard display, providers will only be able to see their own episode information. The ability to navigate is available through the search bar at the top left of the screen. If items appear hyperlinked within the widget, like the diagnosis date in the snip above, clicking on it will take the user to that specific form. An option for searching new patients, forms, or reports does exist in the Client Dashboard. To exit out of the Client Dashboard click the close button at the top right of the screen.

Screen Display

Screen real estate is precious in PCNX. With PCNX there are different ways to maximize/minimize what is visible on the screen. If using a tablet, it may be more difficult to view some information depending on the size of the tablet.

PCNX is opened through a browser therefore sizing can be adjusted through browser settings.

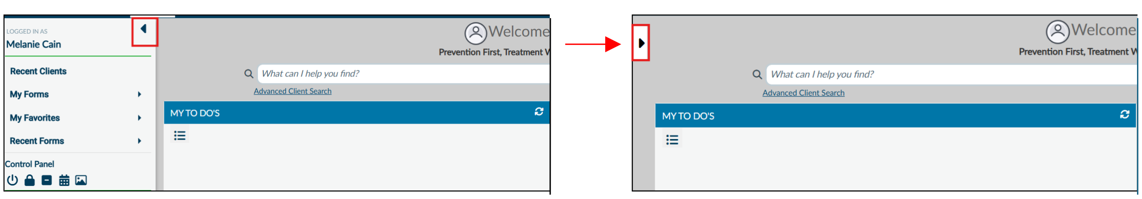


Ways to adjust sizing:

1. Click "Ctrl" key and use track pad or mouse wheel to zoom in/out.
2. **Undock widgets:** In the upper right corner of widgets there is an undock icon that looks like a square with a northeast pointing arrow.
   a.  undock icon
      i. This will open the widget in a new browser window. This can be closed by closing the browser or by going to the User Menu and clicking **Close all Undocked Widgets.**

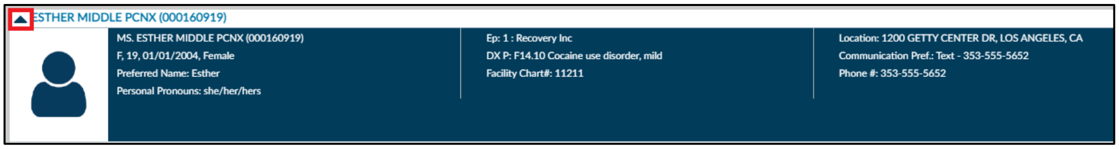
Sliding Panels

1) The Control Panel has a triangle at the top right corner that will minimize the panel, making the remaining view readjust to fill the screen. In the example below, when the triangle is clicked the Control Panel is no longer visible.

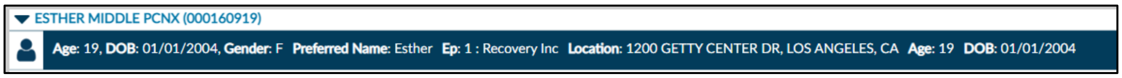


2) When a form is open for a patient, the Patient Header will be visible. The triangle in the upper left-hand corner of the form panel will collapse the header

   a) Expanded Patient Header



   b) Minimized Patient Header



Resources

SAPC Sage website: http://publichealth.lacounty.gov/sapc/providers/sage/?tm

Sage-PCNX Guides for navigation, forms, reports, and widgets:
http://publichealth.lacounty.gov/sapc/providers/sage/sage-pcnx.htm

Registering your C Number, creating your password, and Multi-Factor Authentication use this link to begin the Sage User Enrollment process:
http://publichealth.lacounty.gov/sapc/providers/sage/enrollment.htm

Contacts

General Sage questions: Sage@ph.lacounty.gov

Sage-PCNX Troubleshooting:

- Sage Help Desk Phone Number: (855) 346-2392
- Sage Help Desk: http://publichealth.lacounty.gov/sapc/providers/sage/help-desk.htm
- Sage Help Desk ServiceNow Portal: https://netsmart.service-now.com/plexussupport