

Workflow Purpose

The purpose of this workflow is to assist Sage Users in requesting changes to finalized documents within Sage. The workflow outlines the steps and information required to be submitted to SAPC via a Sage Help Desk Ticket. Without this information, the request may be denied or delayed. Not all requests for modifying documentation will be approved.

This workflow cannot be utilized for:

- Assessment/Treatment Plan notes that were involved in the authorization process. Providers need to create a new note to replace the incorrect note.
- Miscellaneous Notes that were involved in the authorization process cannot be modified. Providers need to create a new note to replace the incorrect note.
- Treatment Plan modifications involving incorrect diagnosis, or errors on problem statements or goals. Providers must create a new treatment plan and document the error on a miscellaneous note.

Workflow Steps

1. Providers contact the Helpdesk via the Sage Help Desk [Portal](#) or by phone.
 - For situations where more than two documents (ex. 10 group notes) are needing modification, users must utilize the online portal system to submit an individual ticket for each note.
 - If only one document requires modification (ex. One treatment plan), users may use the portal or call by phone.
2. The assigned Sage Help Desk agent will work with the provider to validate all the correct information is present before the ticket can be escalated to SAPC for approval.
 - To ensure tickets are processed timely, providers must include the following information in the ticket:
Required Case Information:
 - Client ID with Initials
 - Agency
 - Episode
 - Form/Type of Note (including Miscellaneous Note Type)
 - Date/Time of entry
 - Provider/Clinician (Associated to the note/document)
 - Group size, if applicable
 - Date of service
 - Start Time
 - End Time
 - Justification (must be specific)
3. Once the required information has been validated, the Sage Help Desk agent will escalate the ticket to SAPC for review and final resolution.
4. SAPC will review the request and make a decision to approve or deny based on:
 - The justification for the request.

- How the change may or may not impact the original authorization.
 - How the change may or may not impact the treatment plan.
5. If approved, SAPC will place the requested documentation back to draft for necessary corrections.
- SAPC will provide specific instructions on what changes are permitted based on the original request in the helpdesk ticket
 - SAPC will resolve the ticket once the documentation has been changed from Final to Draft.
 - It is the providers responsibility to then make the necessary changes.
6. Providers should make only the requested changes to the note and should not delete the note.
- Modified notes are subject to later auditing to ensure only the requested changes were made.
7. Once the changes are made, providers must re-finalize the note.
- Once the note is re-finalized, it may show on the Provider Activity Report again
 - Providers should inform their billing department not to rebill this service if it has already been billed and paid.