Provider File Attach Job Aid

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Introduction

The Sage-PCNX Provider File Attach form allows users to upload files in a patient's record, thereby providing the user a place to store various documents in one place related to the patient's treatment as part of the patient's record.

Through the process of uploading files into the Provider File Attach form, users will designate the "type" of file that is being stored. For example, when the user uploads a completed/signed Release of Information SAPC In-Network Providers form, the file can be designated as a Release of Information ("File Type")/ROI Internal ("Document Type") file. This will make tracking the different files stored for each patient easier by viewing thru a patient's Provider File Attach widget/Console Widget Viewer in the

Client Dashboard view and thru the forthcoming Provider File Attach Report. More information about viewing and printing attached files thru a patient's Client Dashboard is provided later in this Job Aid and in the Sage-PCNX Guide to Widgets, http://publichealth.lacounty.gov/sapc/docs/providers/sage/pcnx/PCNX-Guide-Widgets.pdf

Provider File Attach

The Provider File Attach form is comprised of nine (9) fields, Member ID, Provider, File Type, Authorization, Document Type, File Name, Comments, Comment History, and Existing Files.

The form also has three (3) "process options," Upload File, Store File, and Update Comments.

Note:
- The "Submit" button will always be grayed out. Uploading and storing files and/or adding comments to files is done by clicking on one of the "process options." See below for further explanation.

Users can upload either PDF or TIFF files into a patient's records thru the Provider File Attach form. PDF and TIFF files uploaded thru the Provider File Attach form are the only files viewable and/or printable thru the Provider File Attach widget.

Field	Description
Member ID (Required)	Enter either patient last name, first name or PATID
Provider (Required)	Enter Provider
File Type (Required)	A drop-down menu of general categories of the type of document that is being stored
Authorization	A drop-down menu of authorizations – Required if Authorization File Type is chosen
Document Type (Required)	A drop-down menu of specific values to provide more specificity of the document stored
File Name	SAPC strongly encourages that providers follow a file naming convention prior to storing (See Appendix A)
Comments	Enter any comments related to the stored document
Existing Files	Drop-down menu of files stored
Comment History	Displays history of comments previously added to the stored file

Process Options	Description
Upload File	Click to upload a file
Store File	After a file has been uploaded, click "Store File" to store the file. Note that once a file has been stored, no further actions are necessary. The Submit button will always be grayed out.
Update Comments	After a user has entered comments, click "Update Comments" to store the comments. Note that once comments have been updated, no further actions are necessary. The Submit button will always be grayed out.

Uploading and Storing a File

Prior to uploading a file into the Sage-PCNX Provider File Attach form, the file will need to be named and saved on the user's computer. SAPC strongly encourages providers to use the following standardized naming format to name files prior to uploading/storing attachments into Sage thru the Provider File Attach form:

<div align="center">

Document Type-Date (MM-DD-YY)-Patient's First & Last Initial-PATID

</div>

See Appendix A for standardized file naming examples and additional information.

File Type
The "File Type" field has been updated and expanded with new choices to clearly indicate the type of file being uploaded and stored. The new choices represent general categories of the type of document that is being stored, e.g. ASMA, Discharge, Release of Information, etc. This is a REQUIRED field.

Document Type
The "Document Type" field has also been updated and expanded with new document type choices. The new choices represent specific values to provide more specificity of the document being uploaded and stored. This is a REQUIRED field.

The grouping of File Type and Document Type noted in the table below is suggested by SAPC to use when associating a Document Type to a File Type. However, users will have the ability to choose any Document Type from the list, as it is not filtered by File Type.

Table of File and Document Types

File Type	Document Type
ASAM	ASAM CO Triage
	ASAM Continuum
	ASAM Narrative
	ASAM Paper-Based
	ASAM Screener for Youth and Young Adults
	ASAM Summary
Assessment	Diagnosis
	Screening
	Substance Use Screener
Authorization	Initial
	Reauthorization
Behavior Contracts	Behavior Contract
Beneficiary Documents	BenefitsCal Change Report
	Medi-Cal Card/BIC
	Notice of Action
CalOMS	CalOMS - Admission
	CalOMS - Annual
	CalOMS - Discharge
	CalOMS - Youth Detox Discharge
Care Coordination/Referrals	Community Referrals
	DPSS Programs
	Housing Referrals
	Medical Referrals
	School Document
	Social Services
Certificates	Program Completion
	Step down
Consents/Notice of Privacy Practices	Consent for Treatment
	Informed Consent
	Notice of Privacy Practices
Contacts/Collateral	Collateral
	Emergency Contacts
Criminal Justice	AB-109
	Court Orders
	Court Order Treatment
	Minute Orders
	Parole Forms
	Probation Forms
	START
Discharge	RBH Discharge
	Discharge and Transfer
	Discharge Planning
	Discharge Referrals
Financial Eligibility Verification	271 Results
	Financial Eligibility

	MediCal/AEVS Results
	Other County Funding
History and Physical	DHCS Health Questionnaire
	H and P
	Medical Records
Intake	Intake Packet
	Medi-Cal Card/BIC
	Patient Handbook
Labs	Drug Testing- Blood
	Medical Labs
	UA
MAT	MAT Consultation
	MAT Education
Medication	Administration
	Dosing
	MAR/Med Logs
	Safeguarding
	Storage
OHC	Approved EOB
	Co-Pay
	Denied EOB
	OHC- Invoice
	OHC- Statement
Other	Other
Physician/Prescriber Note	MD Note with EDD
	Physician/Prescriber Note- MAT
	Physician/Prescriber Note- Other
Pregnancy Status	Proof of Delivery/Birth
Problem List	Initial
	Problem List- Deletion
	Update
Progress Note	Assessment Note
	Append/Correction Documentation
	Group
	Individual
	Medical Necessity Justification
	Miscellaneous Note
	Problem List/Treatment Plan Note
	Void Documentation
Release of Information	Revocation
	ROI- Internal
	ROI- External
Residential	Mental Health Services
	Outside Groups
	Physical Health Services
	Treatment Hours

	Initial
Treatment Plan/Care Plan	Plan of Care - Peer Support Update
Treatment Verification	Outpatient Enrollment Letter

Process to Upload and Store a File

- Enter the patient's name (last name, first name) or PATID in the "Member ID" field and name of the provider in the "Provider" field, highlighted in blue below. Both are REQUIRED.
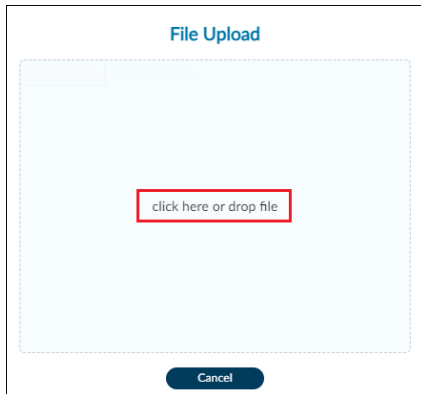- Choose from one of file types from the "File Type" field, also highlighted in blue. This field is REQUIRED.

Note:

- If the user chooses the "Authorization File Type," then the "Authorization" field becomes available and is REQUIRED to be completed. "Authorization" is used to attach files to specific authorizations, which are displayed in a drop-down menu in the "Authorization" field.
- The "Provider" File Type does not have any recommended corresponding "Document Type" choices. SAPC does not recommend that the user select the "Provider" File Type, as the "Provider" File Type indicates that the file is not patient specific and therefore shouldn't be stored in a patient's chart.

- Choose from one of the document types from the "Document Type" field, highlight in blue below. This field is REQUIRED.
- To choose a file to upload, click on "Upload File," highlighted in green below.

- After choosing "Upload File," the following will pop-up.

- A pop-up directory of files/folders on your computer will also open. If a directory does not automatically open, then click on "click here or drop file," highlighted in red above.
  - If the user is not ready to upload a file, click "Cancel" to cancel and go back to the Provider File Attach form.
- While in the "File Upload" box, choose the file the user wishes to upload and store. After the file is chosen, the file name will be displayed in the "File Name" field, highlighted in orange above.
- To attach the file, click on "Store File," highlighted in purple above. Once the user clicks on "Store File," the file will have been "stored" to the patient's record.
- Once the file has been stored the following screen will pop-up.
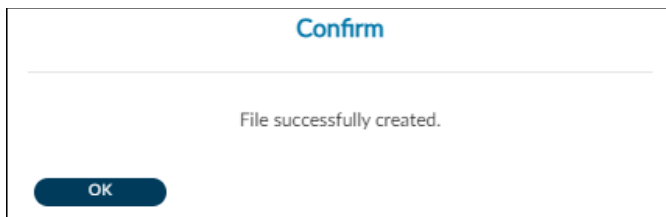
- Click on "OK" to close this screen after which the user can exit the Provider File Attach form.

- To exit the Provider File Attach form, click on "Discard" and the following screen will pop-up.
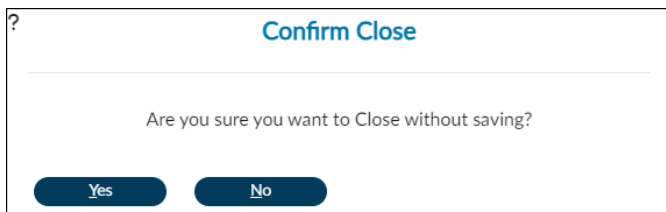
- As previously noted, the "Submit" button will always be grayed out and will not be an option to click.
- Click "Yes" to exit Provider File Attach. There is nothing to "Save" at this step, as the file has already been attached when the user chose "Upload File" from above.

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Adding/Viewing Comments

Comments can be added to the Provider File Attach form while uploading a file or after a file has been stored. Once a comment has been added to a stored file, they can also be viewed later in the Provider File Attach form.

Process to add a comment while uploading a file:
- While uploading a file, the user can also add a comment to the file being stored.
- After the "Member ID," "Provider," "File Type," "Document Type" have been chosen and the file to be uploaded has been selected, prior to uploading the file,
  - The user would type the comment, highlighted in orange below, in the "Comments" box."
  - After entering the comment, the user would then click on "Store File," highlighted in green.

- After clicking on "Store File," the following screen will pop-up.


- Click on "OK" to close this screen after which the user can exit the Provider File Attach form.

- To exit the Provider File Attach form, click on "Discard" and the following screen will pop-up.

Confirm Close

Are you sure you want to Close without saving?

[Yes] [No]

- As previously noted, the "Submit" button will always be grayed out and will not be an option to click.
- Click "Yes" to exit Provider File Attach. There is nothing to "Save" at this step, as both the file will have been stored and the comment will have been added.

## Process to add comments in previously stored files:

- With the Provider File Attach form open choose "Member ID," "Provider," and "File Type," highlighted in green below.
- Then click on "Select" under "Existing Files," or the down arrow to the right of "Select," both highlighted in purple below.
- Files associated with the previous fields selected will appear in a drop-down menu, highlighted in orange below.
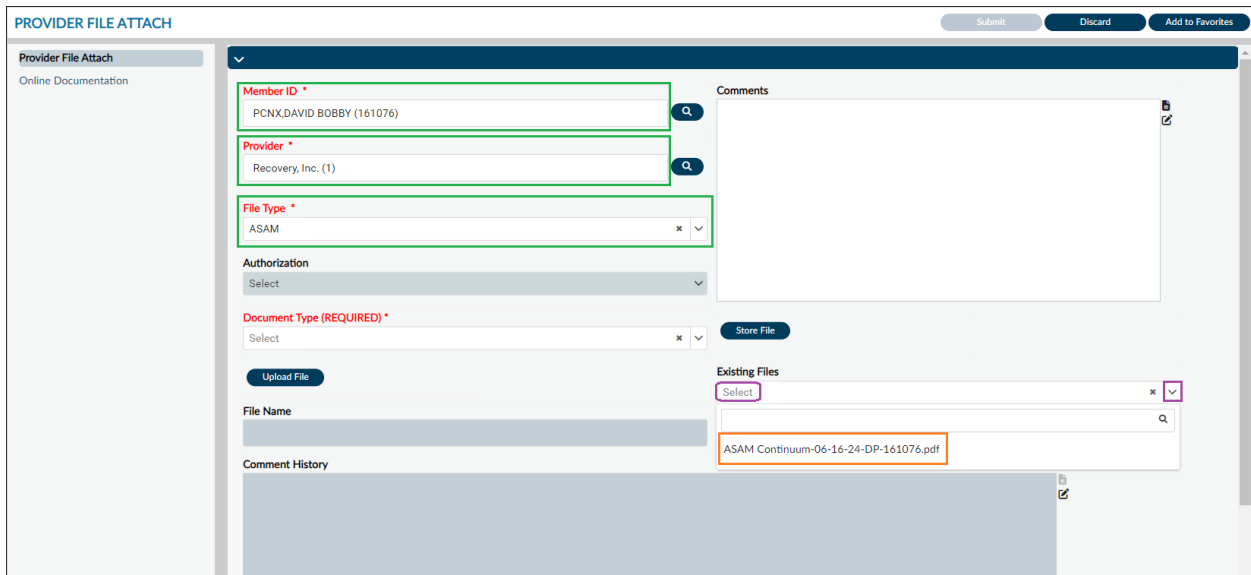
- Choose the file to which comments will be attached.

Note:

- To add a comment to a previously stored file, "File Type" much be chosen. If the user selects a file from the "Existing Files" field, types a comment in the "Comments" box and then clicks on "Update Comments," the user will get the following error message.
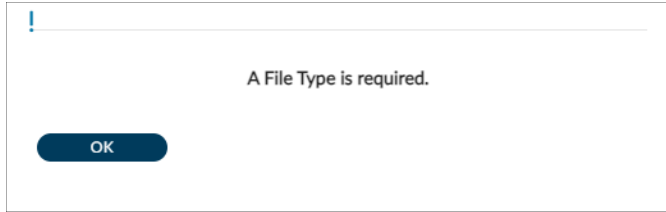
- Click on "OK" to close this screen. Make sure "File Type" is chosen to access the file to which the user would like to add a comment.

- After choosing the file to which a comment will be added, type the comment, highlighted in orange below, in the "Comments" text box, highlighted in purple and click "Update Comments," highlighted in green.
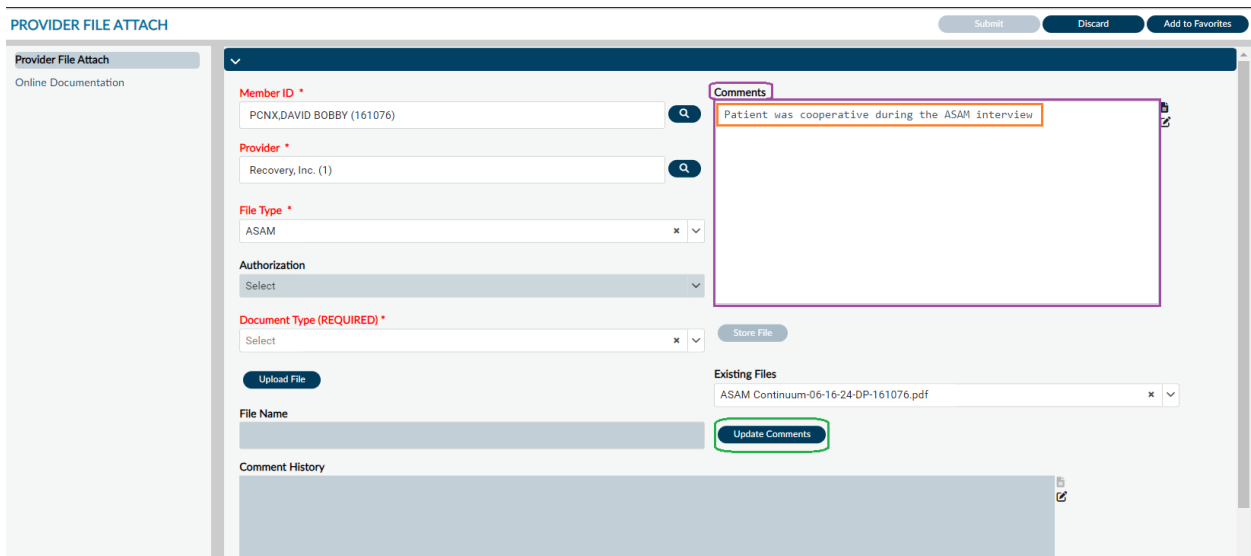
- After clicking on "Update Comments," the following screen will pop-up.
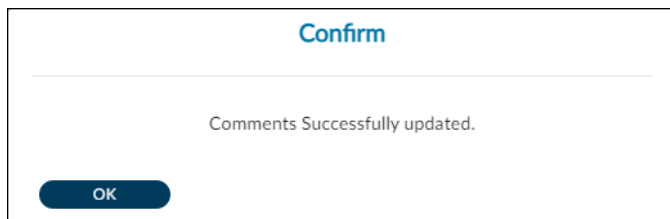
- Click on "OK" to close this screen after which the user can exit the Provider File Attach Form.
- As previously noted, the "Submit" button will always be grayed out and will not be an option to click.
- Click on "Discard," then click "Yes" to exit Provider File Attach (as previously described). There is nothing to "Save" at this step, as the comment will have been added.

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Process to view comments in previously stored files:

- With the Provider File Attach form open choose "Member ID" and "Provider," highlighted in green below.

  Note:
    - To view a comment in a previously stored file, neither "File Type" nor "Document Type" have to be chosen. All stored files for that patient at that provider will be accessible in the "Existing Files" drop-down menu.

- Choose the file from the "Existing Files" drop-down menu choices that contains the comments the user would like to view, highlighted in purple below.
- The comments will appear in the Comment History box, highlighted in orange below.

Once done viewing a comment in a previously stored file:

- Click on "Discard" and the following screen will pop-up.

- As previously noted, the "Submit" button will always be grayed out and will not be an option to click.
- Click "Yes" to exit Provider File Attach. There is nothing to "Save" in this pop-up box, as the comment has either been saved or viewed.

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Viewing and Printing Attached Files through the Console Widget Viewer

Files stored thru the Sage-PCNX Provider File Attach form can be both viewed and printed through a patient's Client Dashboard view. In the Client Dashboard view, the Provider File Attach widget shows a listing of files that have been stored to a patient's record using the Provider File Attach form. As noted earlier, users can upload either PDF or TIFF files into a patient's records and PDF and TIFF files are the only files viewable and/or printable.

- While in the patient's Client Dashboard view, the user navigates to the Provider File Attach widget.
- To view an attached file, click "View" under the View column next to the attached file in the Provider File Attach widget.
- A Read Only version of the file will open in the Console Widget Viewer on the right.
- In the Console Widget Viewer, the user can view and print the record.
- Note that multiple attached files can be opened simultaneously in the Console Widget Viewer.
- When multiple files are opened in the Console Widget Viewer they can be printed individually or all together.

More information can be found in the Sage-PCNX Guide to Widgets, http://publichealth.lacounty.gov/sapc/docs/providers/sage/pcnx/PCNX-Guide-Widgets.pdf

Appendix A

Standardized and appropriate naming of file attachments within Sage helps to organize documents. In addition, standardized naming of file attachments uploaded and stored thru the Provider File Attach form helps users identify required documentation in the system later (e.g. file names appear in the Provider File Attach widget in their Client Dashboard view).

Providers are encouraged to use the following format to name files when uploading/storing attachments into Sage-PCNX thru the Provider File Attach form:

- ## Document Type-Date (MM-DD-YY)-Patient's First & Last Initial-PATID

Standardized file naming examples:
- For Ester PCNX's ASAM Continuum
  - ASAM Continuum-03-15-24-EP-960919
- For Ester PCNX's CalOMS Admission
  - CalOMS-Admission-03-15-24-EP-960919
- For David PCNX's RBH Discharge
  - RBH Discharge-03-15-24-DP-910185
- For Greg Test's Problem List/Treatment Plan
  - PL-TP-01-15-24-GT-961048
- For Davis Alz's ROI for external providers
  - ROIExternal-04-20-24-DA-901162
- For Daniel PCNX's ROI for SAPC In-Network Providers
  - ROIInternal-01-13-24-DP-910185

Note:
- "Date (MM-DD-YY)" indicates when the document was COMPLETED, NOT the date the file attachment was uploaded.
- File names are limited to 150 characters, and the following characters are NOT allowable in the file name: ":*?\<>/|\"