



SAGE UPDATES

All Treatment Provider Meeting
January 14, 2026



COUNTY OF LOS ANGELES
Public Health

Overview

- Updates to KPI Dashboards
- Credentialing and License Verification Updates
- Upcoming Sage Enhancements
- TRAIN Environment Updates
- Clinical Trainings

Updates to KPI Dashboards 2.0

New Year,
New Server,
New Name,
New URL



KPI Dashboards has moved to the Cloud

New Name

KPI Dashboards 2.0 ▶
MSO KPI Dashboards 2.0 ▶



Sage MSO KPI Dashboard ▶
Sage PM KPI Dashboard ▶

New direct access URL

User should contact the Sage Help Desk to receive the new URL

**KPI is still available through the Sage-PCNX KPI Dashboards View*

New KPI Dashboards Overview Guide

<http://publichealth.lacounty.gov/sapc/providers/sage/kpi.htm>

KPI account permission process

**Access is not automatic and must have approval from agency Sage Liaison*

Sheets remain the same
in the Cloud dashboards

- *Same Functionality*
 - *Same Filtering*
 - *Same Exporting*
-

*Have an Enhancement
Request?*

*Submit a Sage Help Desk ticket with
the description “KPI Enhancement
Request”*

**Sage Help Desk ServiceNow Portal: <https://netsmart.service-now.com/plexussupport>*

Credentialing and License Verification Updates



Bi-Annual Reverification

- SAPC sent spreadsheets to all treatment providers in October.
 - We received about 1/3 of the files back.
- Providers voiced concerns about duplication of work due to other divisions requiring similar data.

Next Steps

- SAPC is working internally to unify the processes to minimize duplication.
- Practitioner License Status Widget (as mentioned in previous provider meeting) will be populated with current data received from providers and other sources (NACA, internal verifications) to show practitioners with upcoming expiration dates.
 - Widget to be implemented in Sage by 1/31/2026.
 - If any information is missing from the widget, it indicates Sage does not have the updated data from the providers.
 - Providers should email sageforms@ph.lacounty.gov for additional instructions.

Takeaways

SAPC is internally
verifying license dates
for network
practitioners

SAPC will reach out to
Sage Liaisons to confirm
practitioner status
where
registration/certification
/license dates appear to
be expired.

Practitioners with
expired credentials will
be end dated in Sage to
prevent billing.

Any services that were
provided by a
practitioner beyond the
confirmed expiration
date will be recouped
by SAPC.

Network Practitioner Report

- New report published in December.
- Provides current configuration information in Sage for all practitioners within the date range selected for your agency.
- Used to reconcile Sage with agency information for billing purposes and accurate accounting of staff.
 - Ensure credentials, categories, NPI, Taxonomy are all correct.
- Helpful to use for NACT reporting.
- [Sage-PCNX Guide to Reports](#) for full details of the report.

Network Practitioner Report

Practitioner Category	Practitioner Discipline	Credentials	Primary License Type	Provider	Practitioner Name	Staff ID	User ID	Effective Date	End Date	Active	Deactivated Date	NPI	Taxonomy Code
Clinical Psychologist (CP)	Clinical Psychologist (CP)	Psy.D. (Lic. Psychologist)	Clinical Psychologist (CP)	Recovery, Inc.	HINDMAN,DAVID SAPC	001927	DHindman2	12/01/2017		Active			
Clinical Psychologist (CP)	Clinical Psychologist (CP)	Ph.D. (Lic. Psychologist)	Clinical Psychologist (CP)	Recovery, Inc.	ORELLANA,ESTHER	006883	EOrellana	12/01/2017		Active		1376813667	103T00000X
Clinical Psychologist (CP)	Clinical Psychologist (CP)	Psy.D. (Lic. Psychologist)	Clinical Psychologist (CP)	Recovery, Inc.	SCHWARZ,GREG SAPC	002683	GSchwarz	12/01/2017	05/28/2025	Inactive		1487857397	
Clinical Psychologist (CP)	Clinical Psychologist (CP)	MD	Clinical Psychologist (CP)	Recovery, Inc.	SCHWARZ,GREG SAPC	002683	GSchwarz	05/29/2025		Active		1487857397	103TC0700X
Clinical Psychologist (CP)	Clinical Psychologist (CP)	Ph.D. (Lic. Psychologist)	Clinical Psychologist (CP)	Recovery, Inc.	CAIN,MELANIE	008498	MCain	01/15/2025		Active		1578757621	103T00000X
Clinical Psychologist (CP)	Clinical Psychologist (CP)	Ph.D. (Lic. Psychologist)	Clinical Psychologist (CP)	Recovery, Inc.	CESPEDES-KNADLE2,YOLANDA	008386	YCespedesknadle2	09/09/2024		Active		1821297110	
Licensed - LPHA	Licensed - LPHA	LCSW	Licensed - LPHA	Recovery, Inc.	TESTER,PROVIDER	009245	c190995	12/01/2017		Active		1714983354	104100000X

For our test agency, Recovery, Inc, practitioner Schwarz, Greg SAPC:

1. Initially a Clinical Psychologist.
2. As of 5/29/2025, an update was made to end that license period and add a second license period with the same license type but is now an MD credential.
3. Same practitioner record, but different license effective periods that may impact billing and/or electronic signature.
4. Additionally, the first record is missing the taxonomy code, which will cause state denials.

Upcoming Sage Enhancements



Sage-PCNX Guide to Reports

Enhancement	New or Update	Description
CENS Provider Activity Report	New	Overview of Client Engagement and Navigation Services (CENS) activities documented in the Service Connections Log (SCL) form and the Monthly Activity Report (MAR) form.
Billing by License Type and LOC Report	New	Aggregate count of approved billing by site location, license type, and auth level of care (LOC).
EOB Summary by Date Export	New	Provides an overview of payment and adjustment information from the Provider EOB Remittance Advice based on a selected EOB date range
Network Practitioner Report	New	Listing of an agency's practitioners' configurations in Sage.

Sage-PCNX Guide to Reports

Enhancement	New or Update	Description
Check/EFT Number Report	Update	Added EOB Number and Denied Amount columns
Services Denied in MSO report	Update	Added BATCHID and EOBID columns to assist in claim identification.
County and Aid Code Report	Update	Will be updated to include Share of Cost
Printouts	Update	Discharge and Transfer Form, Drug Testing and Patient Medication printouts added

All Doc/Chart View Update

FINANCIAL ELIGIBILITY

Client Other Healthcare Coverage
Eligibility Verification
Financial Eligibility

CLINICAL DOCUMENTATION

Monthly Activity Report
Problem List/Treatment Plan
Progress Note

DISCHARGE

Discharge and Transfer Form
Recovery Bridge Housing Discharge

HISTORICAL FORMS

CalOMS Supplemental Discharge
Clinical Contact
Miscellaneous Note Options
Other Health Coverage
Progress Note (BIRP)
Progress Note (GIRP)
Progress Note (SIRP)
Progress Note (SOAP)

- Formatting change only.
- Moved forms that are no longer used but contain historical data to the “HISTORICAL FORMS” section at the bottom.
- Avoids confusion of which form to select or use.

Updates to the Modify a Medical Record Form in Sage Help Desk

Effective 1/19/2026,
SAPC is updating the
Sage Help
Desk Modify a Medical
Record Request form

- Improve documentation and efficiency in processing requests.
- Clearer guidance on the form and via a job aid.
- More intuitive workflow.

Updates to the Modify a Medical Record Form in Sage Help Desk



Added pop-up messages with instructions if request cannot be processed.



Added Required fields for Progress Note corrections to reduce back and forth communications.



Replaced Justification field with New fields that help specify which fields will be modified and what will be modified in those fields.

Reminders for Modifying Medical Records

Date fields cannot be modified

- Providers must use Append Documents or create a new record if the date does not populate a billing report.

Assessment, Medical Necessity, Problem List-Treatment Plan Development/Review Progress Notes cannot be modified.

- Providers must use Append Documents or create a new record.

Free text fields MUST be corrected using the Append Documents form.

- Providers should review the SAPC-LNC training for [Document Routing and Appending](#) for assistance with appending documents in Sage-PCNX.

Refreshed TRAIN Environment



PCNX TRAIN Environment

Historically used for basic training and navigation due to limitations of data and maintenance.

Traditionally, minimal utilization across the network.

Effective 1/30/2026 or sooner, the TRAIN environment will be updated to match LIVE configurations, forms, reports and widgets exactly.

Providers will log into their specific system code exactly as they do in LIVE with their own agency information.

The generic SUPR and PRIM will no longer be utilized.

*****IMPORTANT*****

TRAIN is an unsecured environment, and PHI should never be entered into the TRAIN environment. All data currently in the system has been scrambled and/or deleted as appropriate.

Enables providers to fully train new staff in a non-production environment.

TRAIN will be used for HIDEX testing for Secondary Sage Users.

Client data entered into TRAIN will be overridden quarterly to prevent accidental PHI exposure.

Clinical Trainings and Resources



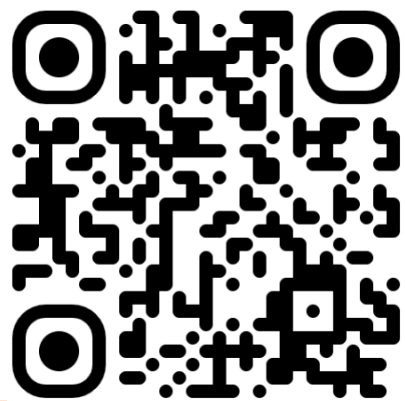
Released to all
SAPC Providers
and Public on
5/1/2025

SAPC @ LNC

LEARNING & NETWORK CONNECTION PLATFORM

The gateway to SAPC's program and network training resources.

Access SAPC LNC Platform Now



Please click the [SAPC-LNC Platform Getting Started Guide](#) for details on platform registration, navigation, and technical support.

Name of Training	Date & Time	
(NEW!) Transgender, Gender Expansive, and Intersex (TGI) Cultural Competence in Behavioral Health Service Provision	On SAPC-LNC	Training Link
(NEW!) Primer on Part 2 & Final Rule Updates	Thursday 1/15/26 1:00pm-3:00pm	Flyer Link
(NEW!) Primer on Part 2 & Final Rule Updates	Tuesday 1/20/26 1:00pm-3:00pm	Flyer Link
Clinical Documentation for Substance Use Treatment Providers: CalAIM Requirements and Best Practices	Thursday 1/15/26 8:30am-12:30pm	Flyer Link
(NEW!) Best Practices in the Assessment and Treatment of Alcohol Use Disorder	Thursday 1/22/26 8:30am-12:30pm	Flyer Link
Introduction to Motivational Interviewing: A Journey Through Meaningful Change	Wednesday 1/28/26 8:30am-12:30pm	Flyer Link
Billing MAT Services Under DMC-ODS: The Codes You Need to Know	Wednesday 2/4/26 9:00am-11:15am	Flyer Link
Enriching Substance Use Treatment with Certified Medi-Cal Peer Support Services	Thursday 2/5/26 9:00am-12:15pm	Flyer Link

For a list of more trainings available and the SAPC Training Calendar please visit or scan QR Code:

[LA County Department of Public Health - Substance Abuse Prevention and Control - SAPC Trainings](https://www.lacounty.gov/publichealth/substance-abuse-prevention-and-control/sapc-trainings)





Thank You!