sage
Substance Use Disorder Information System

MISSING/INCORRECT CLIENT DATA PROCEDURE

PURPOSE: **The following procedure provides guidance for providers to resolve missing or incorrect client data.**

Missing Client

If a client is missing (you cannot see them in the system), please follow the steps below.

1. Search for the client by **Lookup Client** and **Add New Client/Client Search.**

   Note:
   - **Add New Client/Client Search** searches across the SAPC network of Providers
   - **Lookup Client** searches within your organization
   - If client is not found with very specific search criteria, limit the amount of information entered to expand your search and confirm the client is not found.

2. If you cannot find your client after taking these steps, manually admit them.

Client Demographics are Incorrect

If you can see the Client, but the Client has incorrect demographic information please take action per steps below.

1. Make sure to search for the client by **Lookup Client** and **Add New Client/Client Search.**
   Note:
   - **Add New Client/Client Search** searches across the SAPC network of Providers
   - **Lookup Client** searches within your organization

2. Review the Demographics tab and correct information if you have the access to do so.

   Some critical demographic fields, such as Name, Date of Birth and Social Security Number must be corrected by a Sage System Administrator. If you have an incorrect value in one of these fields, please Contact the Netsmart Sage Help Desk via the portal and submit the following information.

   SUBJECT – Request to Update Demographic Information
   Requestors (Contact) Name:
   Facility:
   Client ID:
   Client Name:
   For each field of incorrect or missing data include the following
   - The specific incorrect / missing Information:
   - The correct Information:

Client is Found, but Cannot See Client Information

1. Double check to make sure that you have consent for the client in **Client Consents. If you do not, file the appropriate consent, including your agency.**

   Note: Client Consent was not a part of the automatic conversion process as data was not available. Consent for pre-populated clients must be performed manually.

   If the step above does not resolve the issue, contact the Sage Help Desk via the portal and submit the following information.

   SUBJECT – Request to View Client Information
   Requestors Name:
   Facility:
   Patient ID:
   Patient Name:
   I can see Consent identified for my organization: Yes or No
   Form (screen) name where I am expecting to see information but do not:
   Types of information I am expecting to see but do not:

Authorization Issues

If you believe you have submitted an authorization and that authorization is missing.

1. Go to the **Authorization** section and verify the authorization is present and active
2. If your authorization is missing, submit an authorization request for the remaining dates of the authorization period and upload the original, approval document you received from SAPC via the **Attachments** section for the client and authorization that is being requested.
   Note: The dates for new Authorizations must be from December 1st, 2017, forward.

3. If the authorization has incorrect or missing information submit a Netsmart Sage Help Desk ticket via the portal and include the following information.

   SUBJECT – Request to Update Authorization Information
   Requestors Name:
   Facility:
   Patient ID:
   Patient Name:
   Incorrect / Missing Information:
   Correct Information:

Financial Eligibility Issues

If Financial Eligibility, is missing information, or has incorrect information please follow the steps below.

1. Go to the **Financial Eligibility** section and verify the information.
2. If Financial Eligibility is outdated or from a previous episode and is no longer valid, simply update the information to reflect the current information.

3. If Financial Eligibility has incorrect or missing information, and cannot be resolved via the steps above, submit a Netsmart Sage Help Desk ticket via the portal and include the following information.

   SUBJECT – Request to Update Financial Eligibility Information
   Requestors Name:
   Facility:
   Patient ID:
   Patient Name:
   Incorrect / Missing Information:
   Correct Information:

What should I do if a client has a duplicate record?

If you see that there is more than one record in Sage for a single client, you can request a records merge. To do so you should:

1. Search for the client by **Lookup Client** and **Add New Client/Client Search.**
   Note:
   - **Add New Client/Client Search** searches across the SAPC network of Providers
   - **Lookup Client** searches within your organization

2. Identify which two (or more) records need to be merged.

3. Submit a Sage Netsmart Help Desk via the portal (https://netsmart.service-now.com/plexussupport) and submit the following information:

   SUBJECT – Request to have records merged.
   Requestors (Contact) Name:
   Facility:
   Client IDs of records requesting to be merged:
   Client Name(s) of records requesting to be merged:
   Client Date(s) of Birth for records requesting to be merged:
   Identify which of the records you believe to be the most accurate, if applicable.

4. This will be sent to SAPC for review and merging of records as appropriate.