LAST UPDATED 5.1.20

SAGE SR SELF-REPORT User Guide

What is the SAGE-SR?

The Series of Assessments to Guide Evaluation – Self Report (SAGE-SR) is the only completely self-reported diagnostic assessment compatible with the ICD-10 and the DSM-5. Written at a 5th-grade reading level, the SAGE-SR consists of 65 short overview questions and a selection of follow-up questions. Questions are not open-ended, nor do any questions cover intent to commit suicide or homicide.

Comprehensive Assessment

The SAGE-SR encompasses all diagnostic symptoms of the 31 most common behavioral health diagnoses and episodes (*below*). Intuitive reports provide feedback on pertinent positive endorsements and a list of ICD-10 diagnoses that should be considered, which are compatible with DSM-5. It is up to the clinician to evaluate pertinent positives and to draw their own conclusion about diagnoses. Clinicians are also able to see the client's responses to all assessment items.

continued

Possible SAGE Diagnoses

Affective Disorders	Anxiety Disorders	Psychotic Disorders	Alcohol & Substance Use Disorders
Major Depressive Episode	Panic Disorder	Schizophrenia	Alcohol Use Disorder
Manic Episode	Agoraphobia	Schizophreniform Disorder	Cannabis Use Disorder
Hypomanic Episode	Social Anxiety Disorder	Schizoaffective Disorder	Inhalant Use Disorder
Persistent Depressive Disorder	Generalized Anxiety Disorder	Delusional Disorder	Other Hallucinogen Use Disorder
Major Depressive Disorder	Obsessive-Compulsive Disorder	Brief Psychotic Disorder	Opioid Use Disorder
Other Specified Depressive Disorder	Post-Traumatic	Other Specified Psychotic Disorder	Phencyclidine Use Disorder
Bipolar I Disorder	Stress Disorder		Sedative/Hypnotic/Anxiolytic Use Disorder
Bipolar II Disorder	Adult Attention-Deficit/ Hyperactivity Disorder (ADHD)		Stimulant Use Disorder
Other Specified Bipolar Disorder			Other/Unknown Substance Use Disorder

What is the SAGE-SR?

Designed for Easy Administration

Individual assessments take 10 to 20 minutes for clients to complete, depending upon the number of overview questions endorsed, and little to no clinician time. If a client meets the screening threshold in any diagnostic category, they will be asked a more detailed set of follow-up questions. The total item bank consists of approximately 600 items; however, a client typically receives no more than 100 of these items. No clinician training is required for administration.

Longitudinal Tracking

Clinicians have the ability to track their clients' progress/change over time. Clinicians can decide how often they would like their clients to take follow-up assessments. These assessments include a subset of questions from each module that show the change over time for certain symptoms. Clients will only see questions for diagnoses that were met in the initial SAGE-SR, so follow-up assessments should only take a few minutes to complete.
All follow-up assessments ask about symptoms within the last seven days of taking the assessment (the initial assessment primarily covers a 30-day timeframe). Clinicians will then receive a report showing the clients' change in severity for each initial diagnosis (see pages 6-7 for Longitudinal Reports).

Secure

The SAGE-SR is accessed via a secure (HIPAA-compliant) cloud-based server. Clients can take the SAGE-SR using any internet-connected device with a modern web browser. All data is encrypted at rest with georedundant backups, which are also HIPAA-compliant.

Site Navigation

After logging in to your account you will see the **Home** screen, which includes links to send assessments and view reports. The left sidebar allows you to navigate between different SAGE functions.

1 Send Assessments

Click “**Email**” to send an email containing an assessment link to a client from the SAGE site. Click “**Create Link**” to generate a link that you can email from your own system. See page 8 for details.

2 View Reports

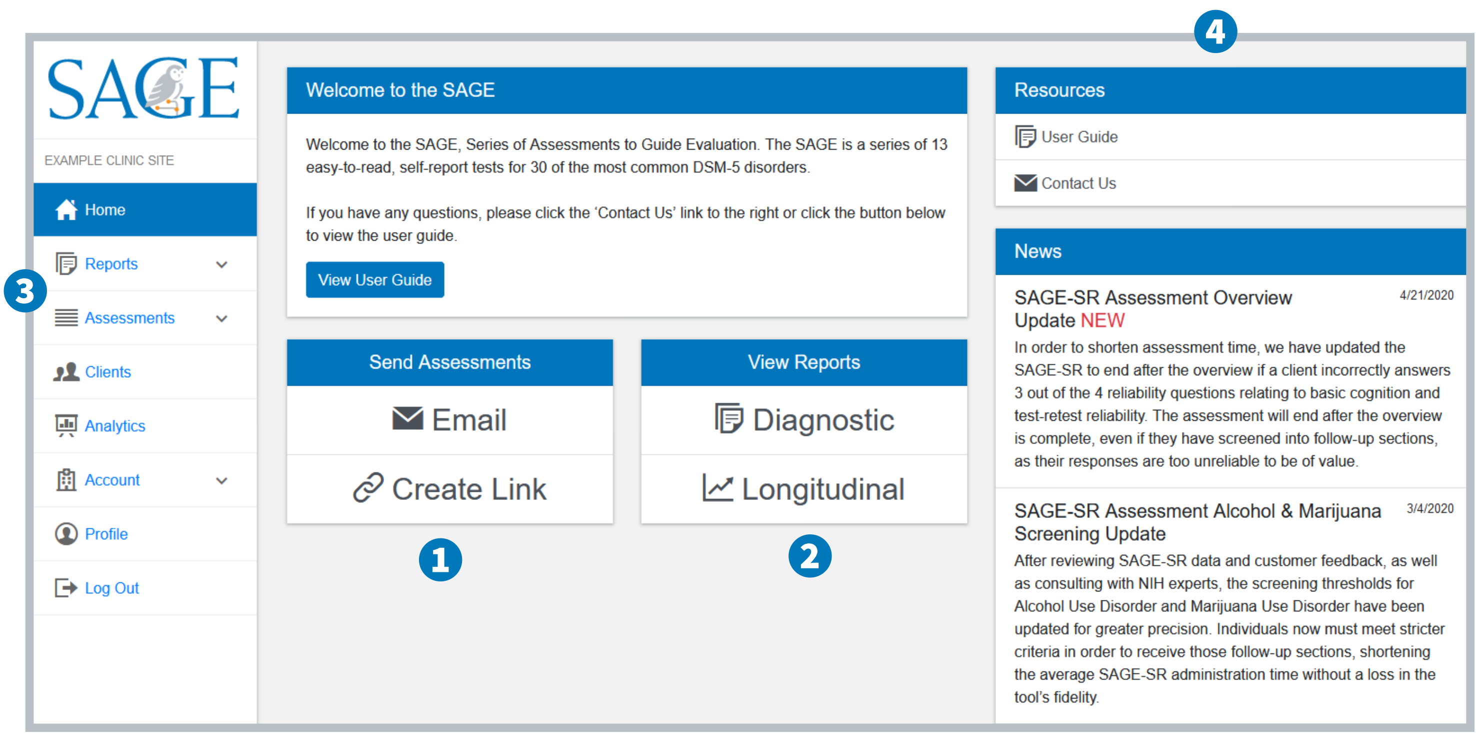
Click “**Diagnostic**” to view initial Differential Diagnostic (DDx) SAGE-SR reports. Click “**Longitudinal**” to view reports from longitudinal assessments. See page 4 for details.

3 Sidebar

These functions can also be accessed from the left sidebar. (*Available sidebar options may differ, depending on the permissions granted to your account.*)

4 Resources / News

To the right, there are news updates alerting users to new updates or features, as well as training materials, and a link to contact TeleSage if you have any comments or questions.



There are two types of reports available in the SAGE-SR:

The **DDx report**, a differential diagnostic report which is created after a client takes an initial SAGE-SR assessment

The **Longitudinal Report**, which is created when a client takes follow-up assessments based on the diagnoses in their DDx report

Both reports are only displayed on the reports page once a client begins an assessment. If a link has been sent, but they have not begun the assessment, their information will be displayed in **"Pending Assessments."** If a client begins, but does not complete an assessment, they have 7 days to resume it. Note that you must send a new link for a client to resume an assessment, since each link is valid for only one use. When they open the new link, they will see a prompt asking if they wish to resume the session (as long as it is within 7 days).

Differential Diagnostic Reports

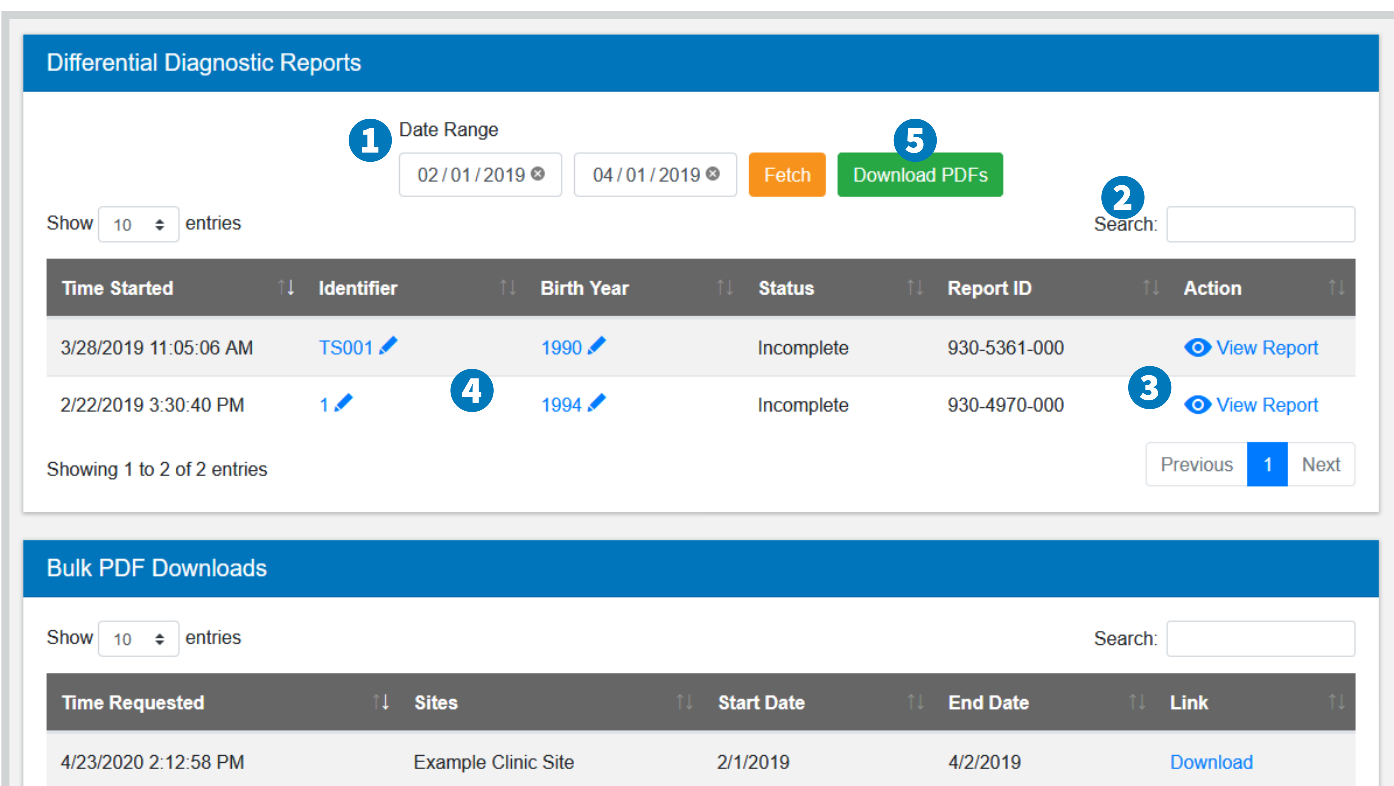
1. **View a Specific Date Range:** By default, the page displays the 20 most recent reports, but you may use the date fields at the top of the page and click **"Fetch"** to display reports for a different date range.

2. **Search for reports** by time started, identifier, year of birth, completion status, or report ID: Start typing into the box next to **"Search"** to find individual assessments.

3. **Access a report:** Click on **"View Report"** in the action column.

4. **Edit:** Click the pencil icon to edit the Identifier or Birth Year.

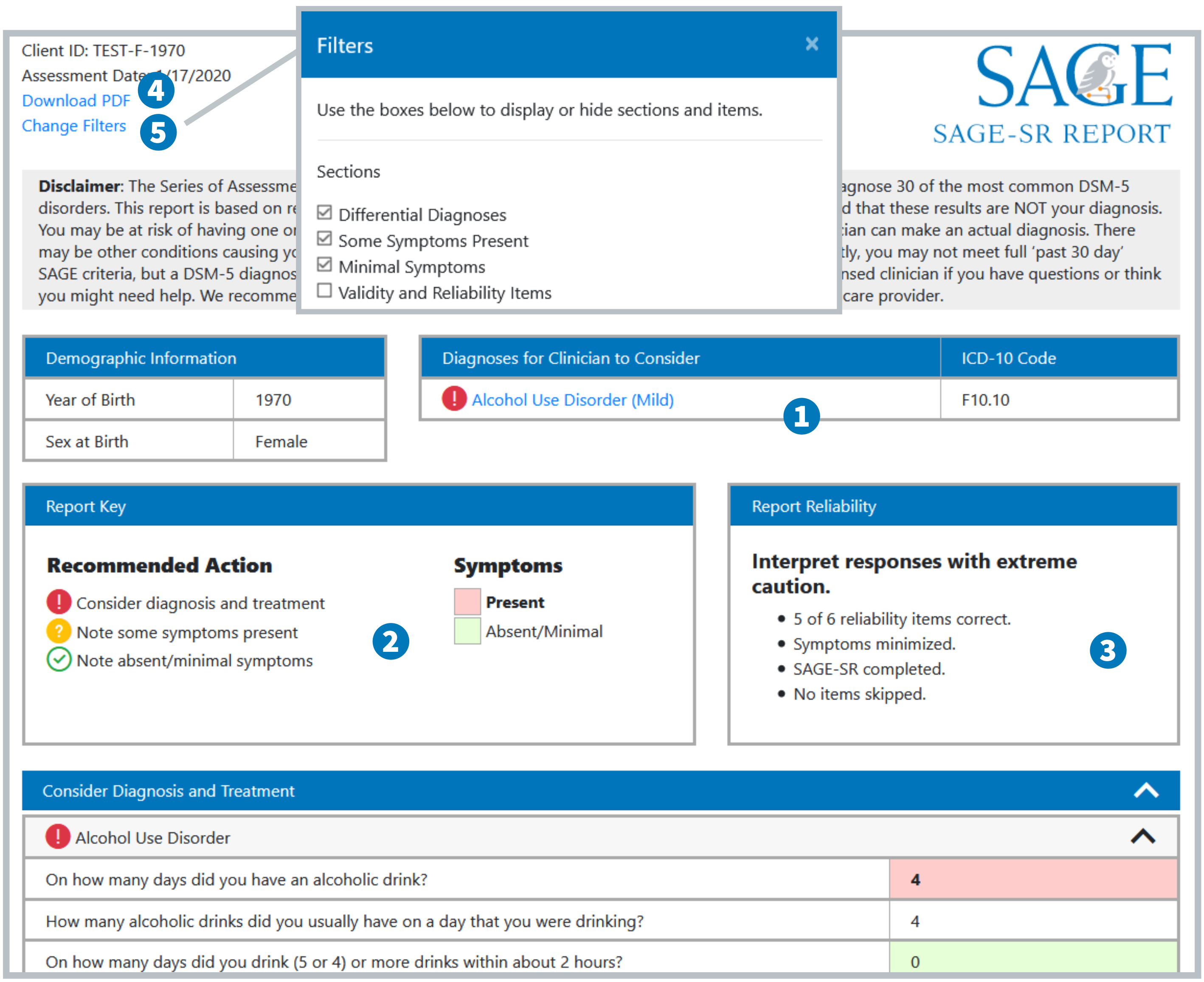
5. **Download PDFs:** To download multiple reports, enter the date range that you want to download and click the **"Download PDFs"** button. When your download is available, you will see a link in the Bulk PDF Downloads table below.



Interpreting the DDx Report

A comprehensive differential diagnostic report is generated for each initial SAGE-SR assessment, regardless of whether the client completes the assessment.

1. **Diagnoses to consider** are found to the right of the demographic information. Clicking on any of these will take you to the corresponding section of the report where you will see the client's answers to the questions from that section.
   Note that these are not official diagnoses and ***must*** *be confirmed by a clinician.*
2. **The report key** explains the different symbols and colors used within the report.
3. **Report reliability** is a snapshot indication of the reliability of a particular assessment. It is based on responses given to a set of validity items that are part of the assessment, which could indicate a client either overemphasizing or underemphasizing symptoms.
4. Create a printable pdf of the report by clicking **"Download PDF"**. The pdf will show the report with whichever filters you've selected.
5. **"Change Filters"** is shown in the upper left corner of the report. Clicking it will open a pop-up box to change filters, which allows you to show or hide different sections of the report.



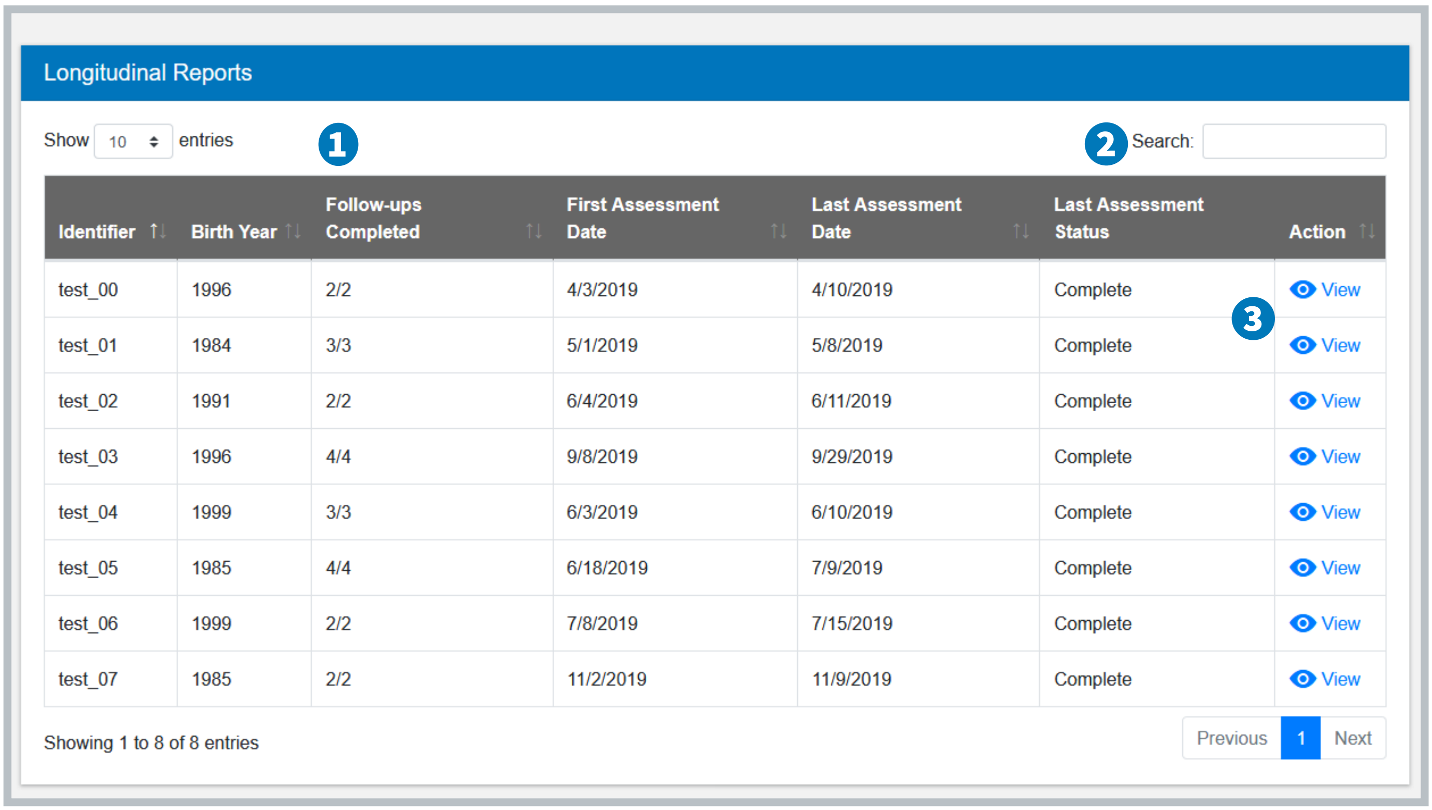
Longitudinal Reports

Longitudinal reports are displayed once a client starts their first follow-up assessment. Like the initial assessment, clients have seven days to resume an incomplete follow-up assessment, but they will need a new link sent to them if they began a session but did not complete it.

1. **Follow-ups Completed** indicates how many follow-up assessments have been completed by the client, as well as how many links have been sent to them.

2. **Search for Longitudinal Reports** by identifier, birth year, date of assessments, or last assessment status. Start typing into the box next to "**Search**" to find reports.

3. **Access a report:** Click on the blue "**View**" link in the "**Action column**" to open a report.



Longitudinal Reports

Show 10 entries 1

2 Search:

Identifier	Birth Year	Follow-ups Completed	First Assessment Date	Last Assessment Date	Last Assessment Status	Action
test_00	1996	2/2	4/3/2019	4/10/2019	Complete	View
test_01	1984	3/3	5/1/2019	5/8/2019	Complete 3	View
test_02	1991	2/2	6/4/2019	6/11/2019	Complete	View
test_03	1996	4/4	9/8/2019	9/29/2019	Complete	View
test_04	1999	3/3	6/3/2019	6/10/2019	Complete	View
test_05	1985	4/4	6/18/2019	7/9/2019	Complete	View
test_06	1999	2/2	7/8/2019	7/15/2019	Complete	View
test_07	1985	2/2	11/2/2019	11/9/2019	Complete	View

Showing 1 to 8 of 8 entries

Previous 1 Next

Interpreting Longitudinal Reports

Longitudinal reports show a client's progress over time. Reports will update with data from each additional follow-up assessment. Note that follow-up assessments ask about symptoms within the past 7 days, while the initial assessment primarily covers the past 30 days.

1 **Severity scores** are plotted in a graph for each differential diagnosis identified during the initial assessment. Scores are on a 10-point scale and are calculated using only the items that are asked in the follow-up assessment. The severity score is also shown above the item responses for each diagnosis under the corresponding assessment date.

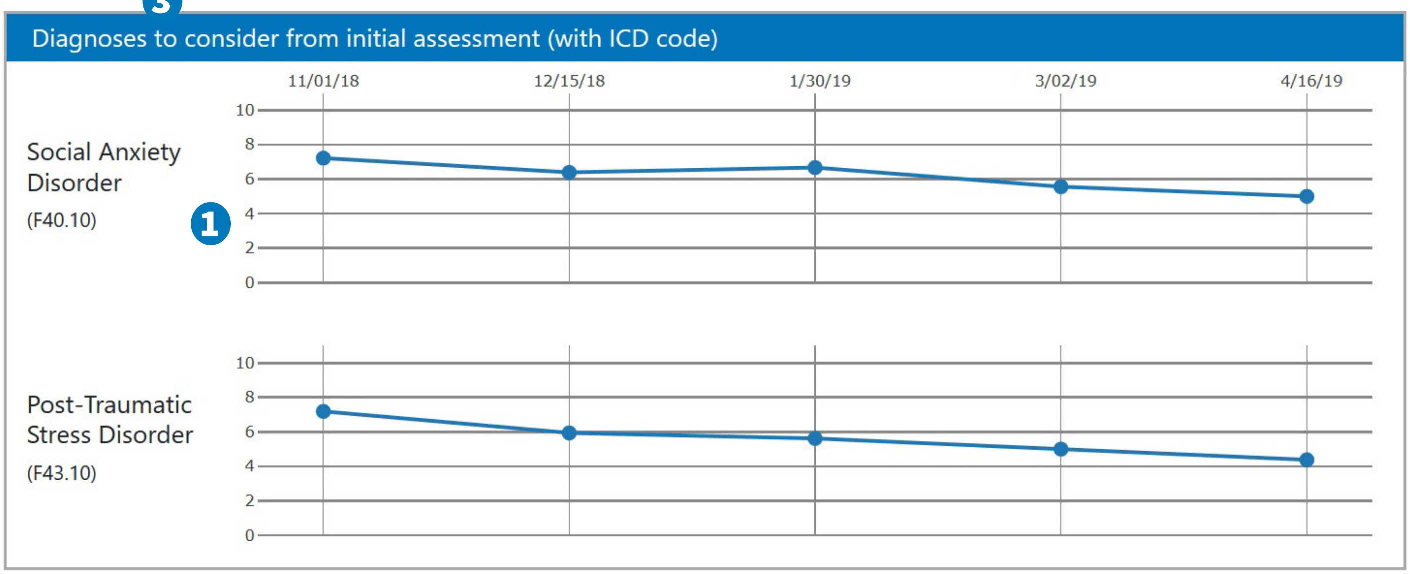
2 **Responses** are shown for each diagnosis that was given in the initial assessment. The first column shows data from the initial assessment. Each additional column represents a follow-up assessment, identified by date and severity score.

3 Click **Download PDF** to download a printer-friendly copy of the report.

Client ID: test1
Initial Assessment Date: 11/1/2018
Year of Birth: 1985
Sex at Birth: Female
Download PDF

SAGE
SAGE-SR REPORT

3



Social Anxiety Disorder

Assessment Date	11/01/18	12/15/18	1/30/19	3/02/19	4/16/19
Severity Score 2	7.22	6.39	6.67	5.56	5
I felt nervous or anxious when speaking to large groups of people.	**Often**	**Often**	**Often**	**Often**	**Often**
I felt nervous or anxious when eating or drinking in front of others.	Sometimes	Sometimes	Sometimes	Rarely	Rarely
I felt nervous or anxious at a party or social gathering.	**Often**	**Often**	**Often**	Sometimes	Sometimes

Clicking **Assessments** in the sidebar will display a drop-down of options for sending assessments: **Send SAGE-SR**, **Send Follow-Up**, **Generate Link**, and **Create Public Link**.

Send SAGE-SR

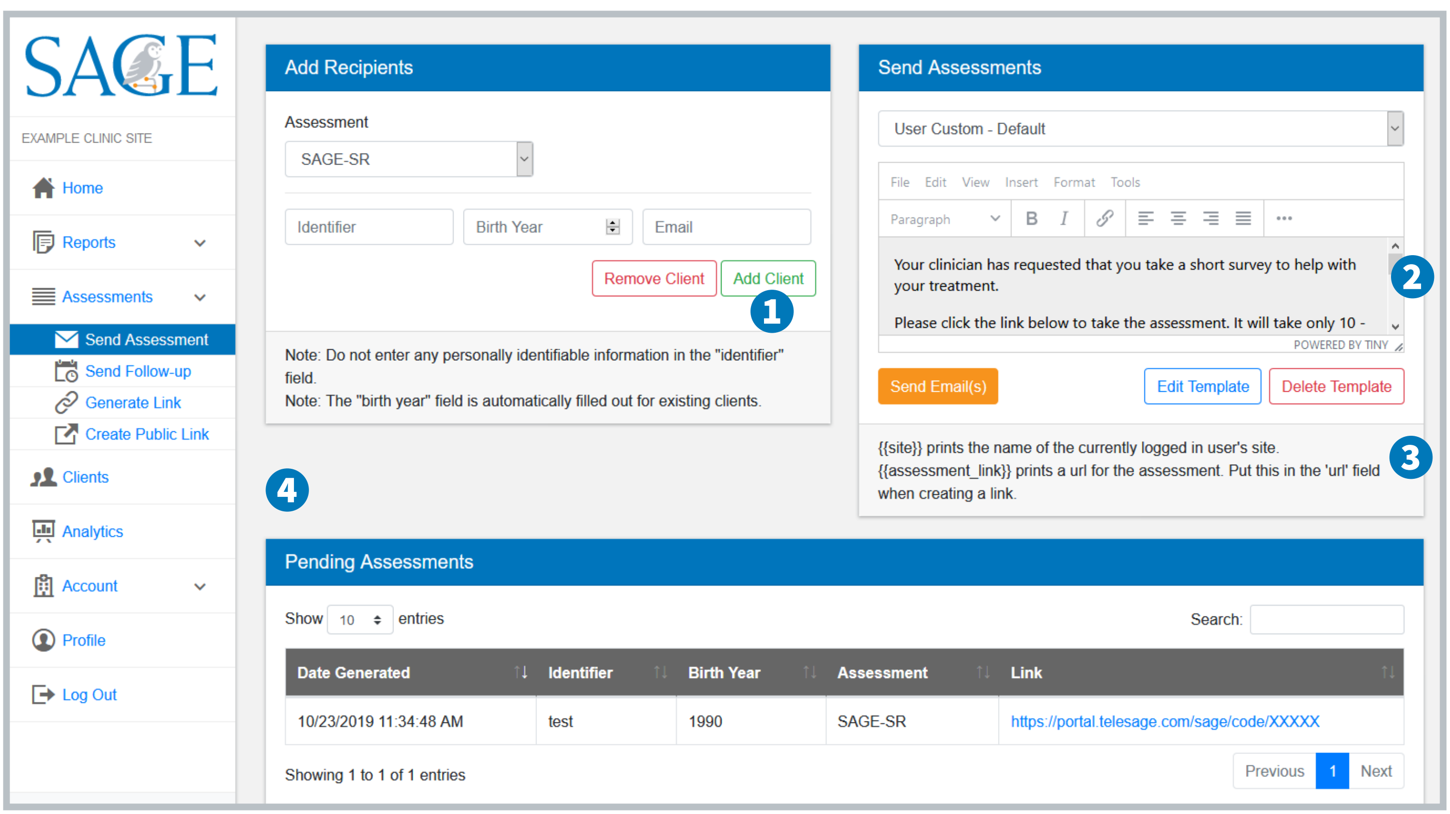
This method allows users to send a personalized email to their clients with a link to the initial assessment. The link will expire once he or she clicks the link and begins the assessment.

1. If you want to send emails to multiple clients, click **"Add Client."** You must enter the year of birth, identifier, and email address for each client. An identifier can be any combination of letters and numbers, and is unique to a client. *While the SAGE is HIPAA—compliant, we strongly encourage you to use an identifier that does not contain Personal Identifiable Information (PII).* If you enter an identifier that has already been used, the year of birth will prefill and you only need to enter the email address.

2. The text box to the right is prefilled with the text of the email each client will receive. You may customize the text of the email so clients do not mistakenly delete the email or mark it as spam. Please note that the email is sent from **sage@telesage.com.** There is a drop-down menu (if applicable) to select an agency or clinic level email message.

3. You can also create and save your own email templates using the place holders below the text box. If you wish to create a hyperlink to the assessment, click the link icon in the toolbar, and copy and paste **"{{assessment_link}}"** in the 'URL' field in the pop-up.

4. Below "**Send Assessments**" is "**Pending Assessments**," a table that displays all SAGEs that have been sent to a client, but not completed (both initial and follow-up assessments.) You can sort this table by clicking the arrows next to "**Date Generated**," "**Identifier**," "**Birth Year**," or "**Assessment**". You may also use the search tool to find specific pending assessments.



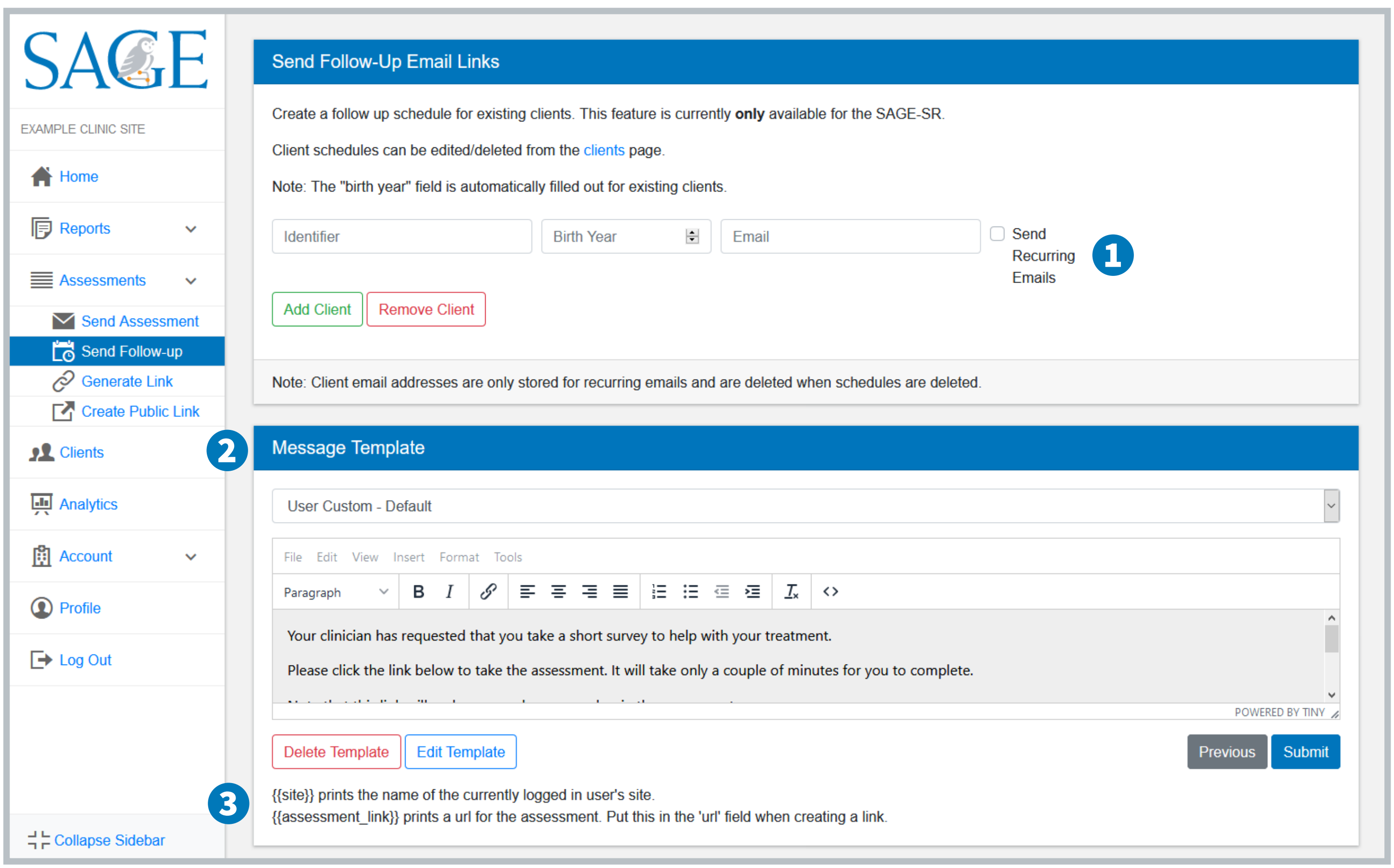
Send Follow-up

This method allows users to send a personalized email to their clients with a link to the initial assessment. The link will expire once he or she clicks the link and begins the assessment.

1. Click "**Send Recurring Emails**" to set up a schedule for follow-up assessments. Select a frequency (in weeks) from the dropdown. You also have the option to send a follow-up assessment immediately by checking the "**Send Now**" box. If "**Send Recurring Emails**" is not selected, the follow-up assessment email is also sent immediately.

2. The "**Message Template**" works the same as the templates from the initial assessment. It is prefilled with a default message and you may customize the text of the emails so that clients do not mistakenly delete the email or mark it as spam. Please note that the email is sent from **sage@telesage.com**.

3. You can also create and save your own email templates using the placeholders below the text box. If you wish to create a hyperlink to the assessment, click the link icon in the toolbar, and copy and paste "{{assessment_link}}" in the URL field in the pop-up.



Assessments

Generate Personalized Assessment Links

If you would rather send clients a link to the SAGE-SR yourself, you can generate personalized links to both the initial and follow-up assessments on this page. You can then copy the link into an email or text message to send to your client(s).

Create Personalized SAGE-SR Assessment Link

1. Enter an identifier and birth year in the form on the left for each client/participant for whom you wish to generate a link. If you enter an identifier that has already been used, the year of birth will prefill and you will only need to enter the client's email address.

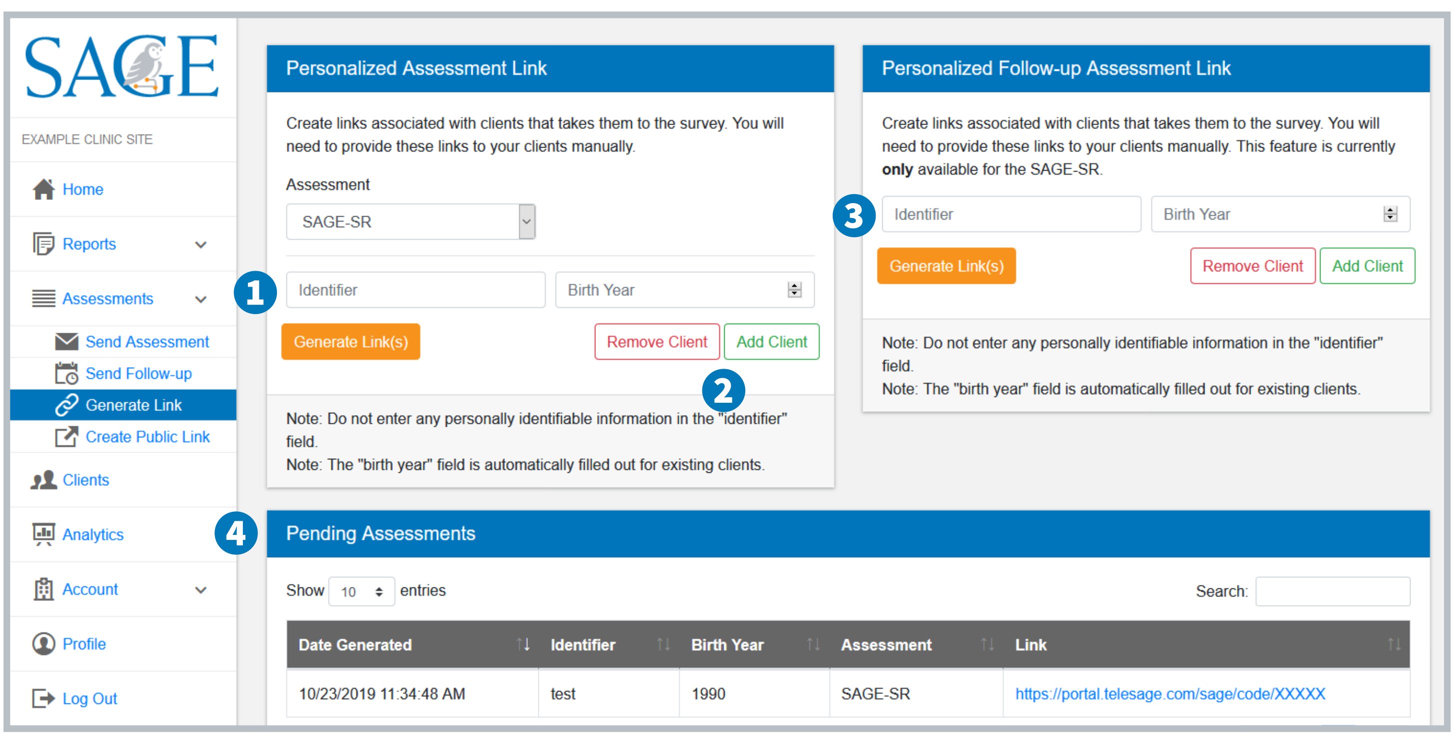
2. Click "**Add Client**" and "**Remove Client**" as needed. When done, click "**Generate Link(s).**" After clicking "**Generate Link(s),**" the link(s) will appear in the "Pending Assessments" table below. You can then distribute the links using your preferred method.

Create Personalized Follow-up Assessment Link

3. Enter an identifier and birth year in the form on the right to generate a link for a follow-up assessment. Note that you will only be able to generate follow-up links for current clients that have taken an initial assessment AND received a differential diagnosis.

View All Links

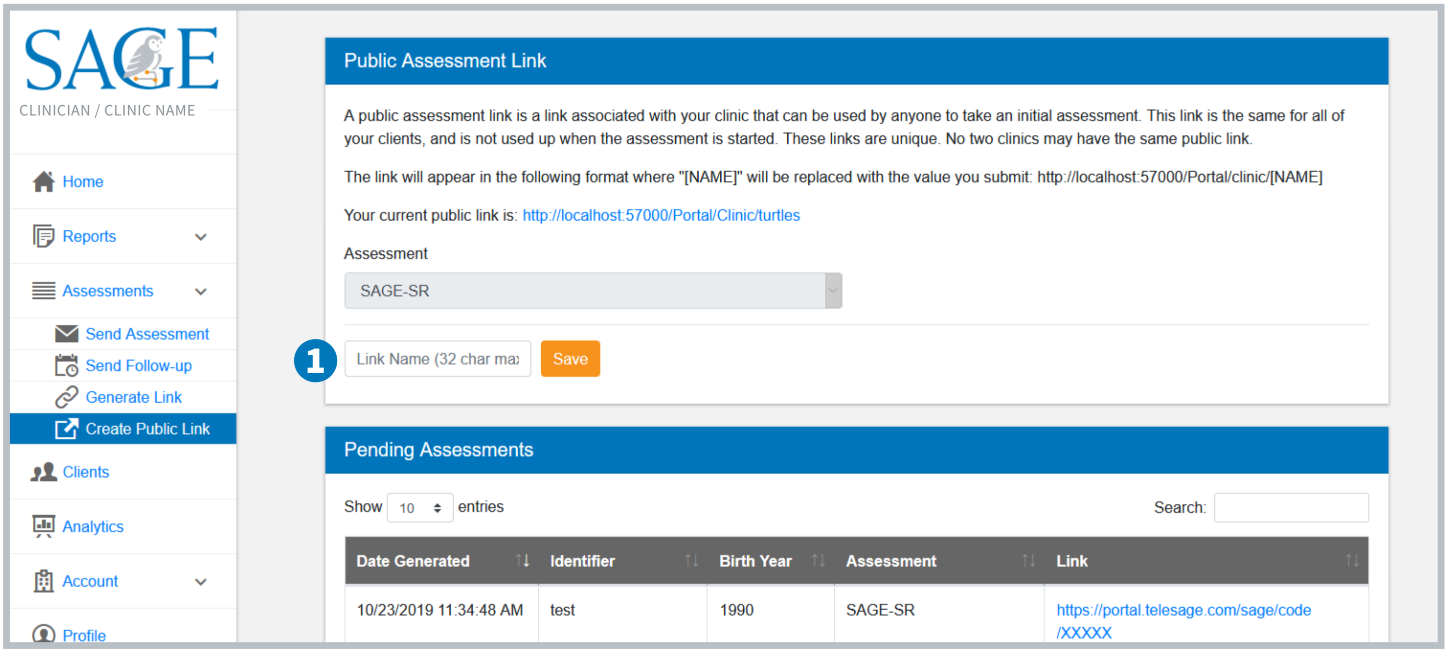
4. "**Pending Assessments**" displays all the links you have generated. You can sort this table by clicking the arrows next to "**Date Generated**," "**Identifier,**" "**Birth Year,**" or "**Link,**" or you may use the search tool in the upper right corner.



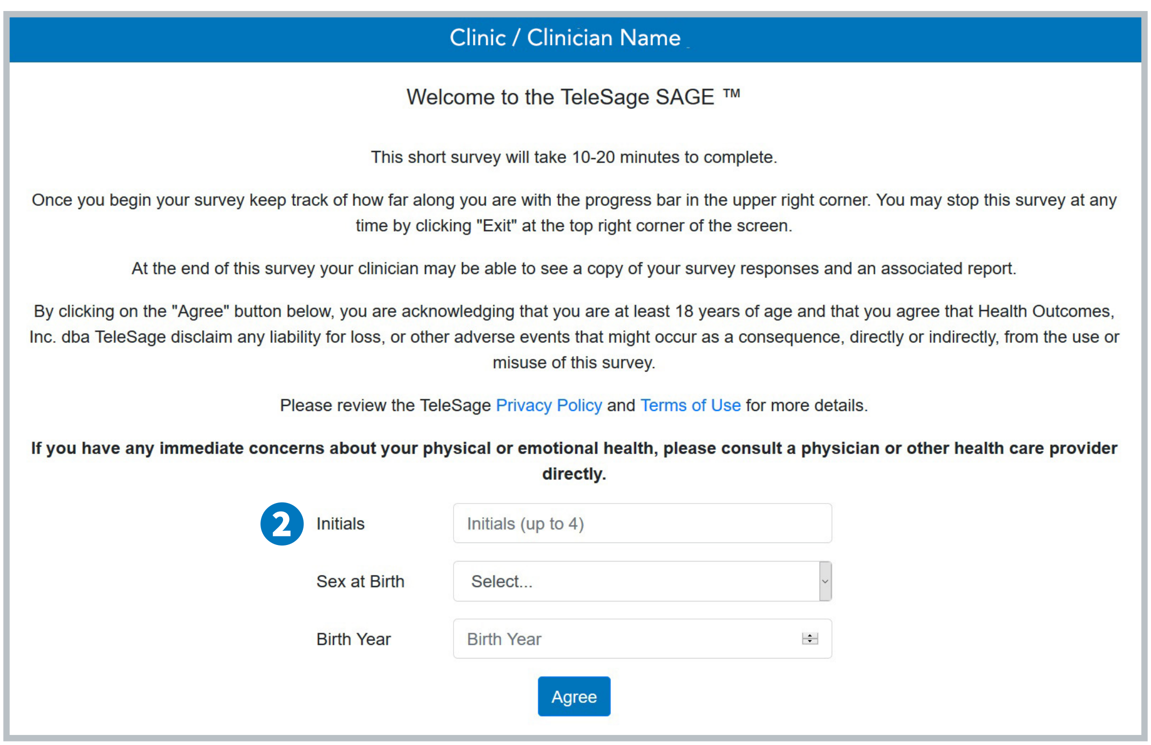
Generate Public Assessment Link

A public assessment link is a link associated with your clinic that you can send to any client to take the initial SAGE-SR assessment. It cannot be used to send follow-up assessments. All clients can use the same link to take the initial assessment. You can copy this link into an email or text to send to clients.

1. Enter the desired link name into the text box and click **"Save."** The public link will appear above the text box. You can then copy and paste the link to distribute it.



2. Before beginning the SAGE from the public assessment link, clients will be asked to enter their initials (up to 4 letters), sex at birth, and year of birth. This information will be used in place of an identifier. For example, client John Jones, born male in 1978, would be assigned JJ-M-1978 as his identifier for the SAGE Dashboard and Reports page.



Clients

Use the “Clients” page to edit client information, view client information by identifier or birth year, and check the status of assessments. This page displays the number of complete assessments, the number of incomplete assessments, last assessment status, and last assessment date.

Clients

Show 10 entries 3 | 1 Search:

Identifier	Birth Year	Assessments Completed	Assessments Not Completed	Last Assessment Status	Last Assessment Date	Action
100	1985	0	1	Early Exit	8/27/2018 1:28:48 PM	Edit
101	1985	0	1	Early Exit	8/27/2018 1:30:51 PM	Edit
1010	1985	0	0	N/A		Edit
123	1985	0	1	Early Exit	9/20/2018 11:33:58 AM	Edit
124	1985	0	1	Early Exit	9/20/2018 11:38:50 AM	Edit

1 **Find information by identifier or birth year:** Sort clients by clicking the up/down arrows next to any column heading, or use the search box.

2 **Edit the identifier and birth year of each client:** Click “**Edit**” next to the blue pencil icon. Be sure to click “**Save**” or “**Discard**” after making changes.

3 **Change number of clients displayed per page:** Use the drop-down menu at the top of the page to change the number of clients displayed per page.

Scheduled Follow-up Emails

The list of scheduled follow-up emails is below the client list. This table displays the status and date of the last assessment, the scheduled follow-up date, and the follow-up frequency.

Scheduled Follow-up Emails

Show 10 entries | Search:

Identifier	Birth Year	Last Assessment Status	Last Assessment Date	Scheduled Follow Up Date	Weekly Follow Up Frequency	Action
4587	1985	Not started		6/11/2019	1	Edit Delete
5251	1980	Not started		6/11/2019	1	Edit Delete

1 Find client schedules by clicking the up/down arrows next to each column heading. You can also search for specific schedules by using the search box in the upper right corner.

2 **Edit the frequency of emails:** click “**Edit**” in the “**Action**” column to change the number of weeks between follow-up emails. Click “**Save**” or “**Discard**” after making changes..

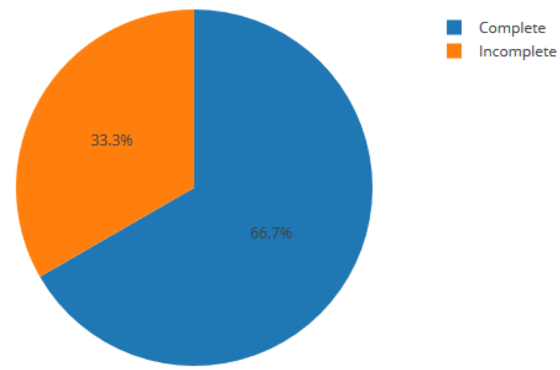
3 **Cancel a follow-up schedule:** Click “**Delete**” in the pop-up box to confirm that you would like to cancel any follow-up emails for the client. Once deleted, their email address will be removed from our system (but all assessment data remains).

Analytics

The analytics page displays multiple tables and pie charts to help you analyze SAGE-SR usage and outcomes. All data is calculated at the site level, not per user.

Total Assessments Today: 3	
# Complete Today	2
# Incomplete Today	1

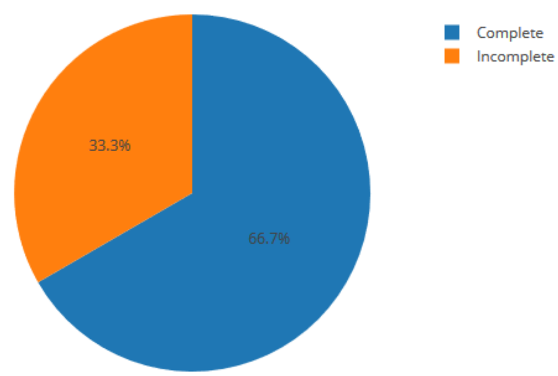
SAGE Surveys Taken Today



SAGE Surveys Taken Today displays the percentage of complete and incomplete surveys for the current day.

Average Assessments per Day: 3	
# of Days in Which SAGEs Were Taken	50
Average # Complete per Day	2
Average # Incomplete per Day	1

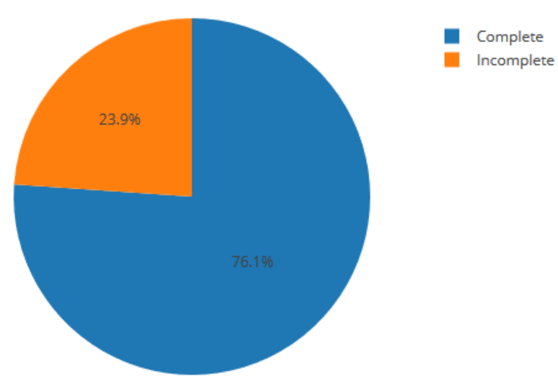
SAGE Surveys Taken Per Day



SAGE Surveys Taken Per Day displays the average number of complete and incomplete surveys per day as a percentage of the average number of surveys per day .

Total Assessments: 184	
# Complete	140
# Incomplete	44
Average Time to Complete	14.96 min.
Average Time per Question	9.29 sec.
# Diagnoses Rendered	334
# Reports Viewed by Clinicians	38

Total SAGE Surveys Taken

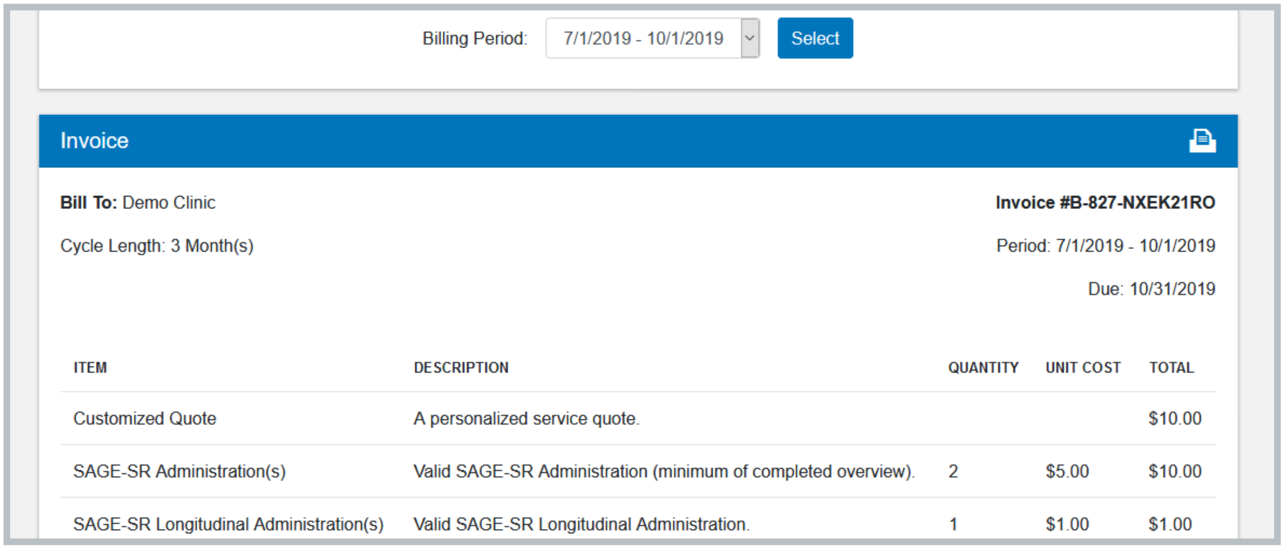


Total SAGE Surveys Taken displays the percentage of complete and incomplete surveys using the total number of surveys.

Account

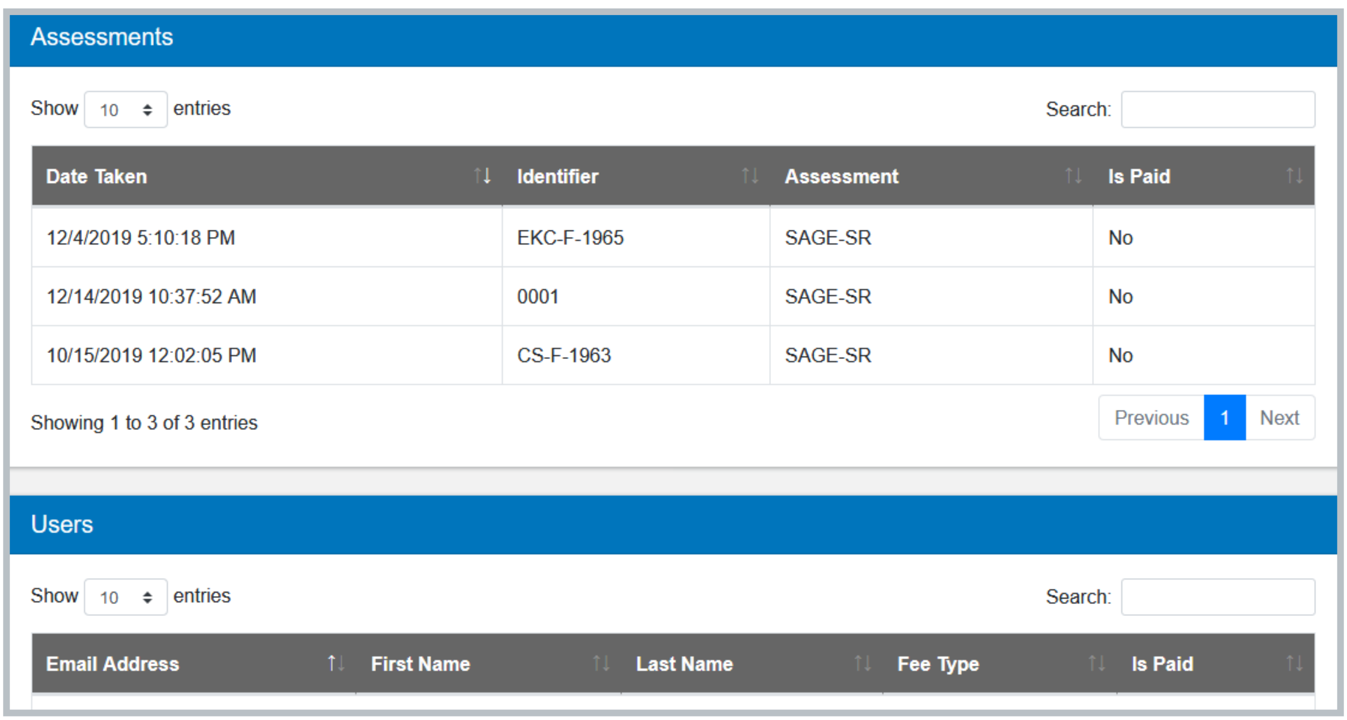
The Account tab contains links to your Current Invoice, Billing History, Payments, and Services.

"Current Invoice" displays your current quarterly invoice and any prepaid credits you may have.
You can also view past invoices.



ITEM	DESCRIPTION	QUANTITY	UNIT COST	TOTAL
Customized Quote	A personalized service quote.			$10.00
SAGE-SR Administration(s)	Valid SAGE-SR Administration (minimum of completed overview).	2	$5.00	$10.00
SAGE-SR Longitudinal Administration(s)	Valid SAGE-SR Longitudinal Administration.	1	$1.00	$1.00

"Billing History" shows the assessments sent and the users on the account for each quarter.
To change billing quarters, choose a timeframe from the dropdown at the top of the screen.

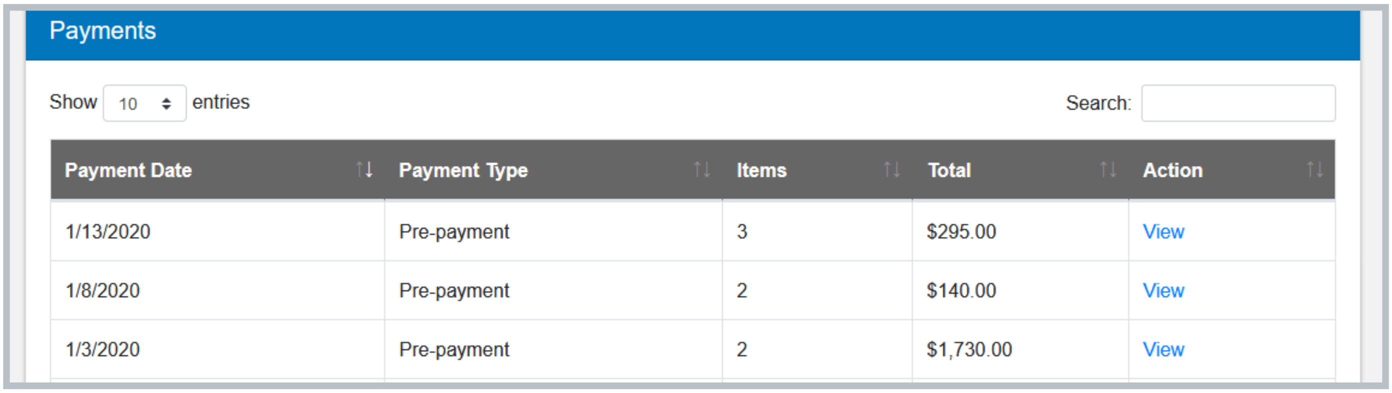


Date Taken	Identifier	Assessment	Is Paid
12/4/2019 5:10:18 PM	EKC-F-1965	SAGE-SR	No
12/14/2019 10:37:52 AM	0001	SAGE-SR	No
10/15/2019 12:02:05 PM	CS-F-1963	SAGE-SR	No

Email Address	First Name	Last Name	Fee Type	Is Paid

Account

If you made payments in the past, you will be able to view your transaction history on the **“Payments”** page. Clicking on **“View”** will allow you to see a receipt of your payment.



Payment Date	Payment Type	Items	Total	Action
1/13/2020	Pre-payment	3	$295.00	View
1/8/2020	Pre-payment	2	$140.00	View
1/3/2020	Pre-payment	2	$1,730.00	View

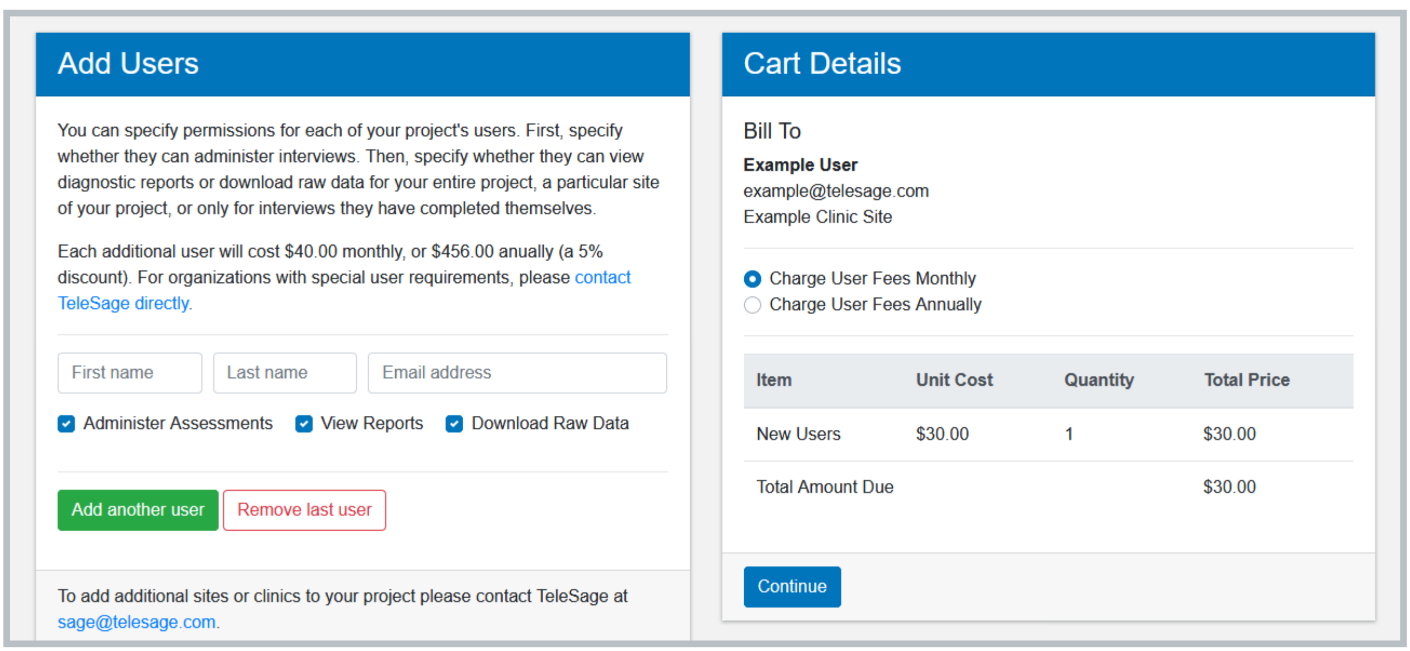
The **“Services”** page allows you to add users to your SAGE account or to sign up for another TeleSage product, the [NetSCID] (electronic version of the Structured Clinical Interview for DSM-5).

To add users, click “Add Users” to see information about cost. Click the green **“Add another user”** button and enter the name and email address of the user you are adding to your clinic. You can select permissions for any new users (administer assessments, view reports, and download raw data).

To remove current users from your account, please contact TeleSage.

Cart Details will update based on how many users you add. You can choose to pay monthly or annually *(annual payments receive a 5% discount)*.

Click **“Continue”** when you are ready to pay for your new users. You will be taken to the Paypal site to pay your bill.

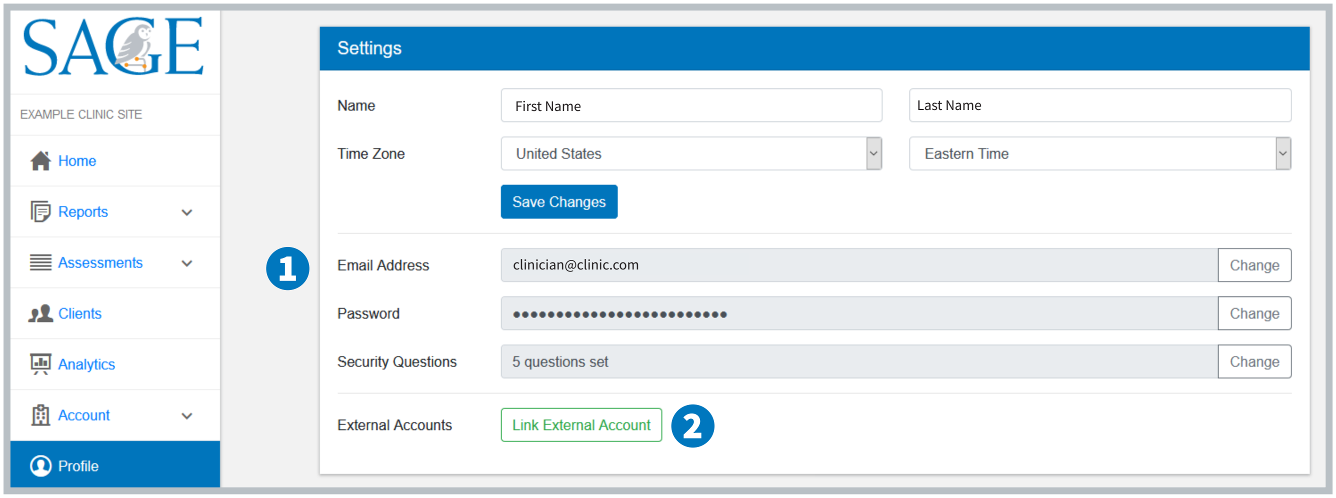


Profile

Your profile displays your user information including your name, email address, and timezone.

1. Change your password, email, or security questions by clicking the corresponding button.

2. Click **“Link External Account”** to gain access to login through your clinic/provider’s site. This allows you to log into the SAGE dashboard by logging into your clinic/provider account.



Change Site

If you work at more than one clinic or are part of a project with different sites, SAGE-SRs and all other associated data are stored separately for each clinic/site.

You can access different clinics/sites by clicking **“Change Site”** in the dashboard. Then select the name of your desired site.