The 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.

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**Possible SAGE Diagnoses**

<table>
<thead>
<tr>
<th>Affective Disorders</th>
<th>Anxiety Disorders</th>
<th>Psychotic Disorders</th>
<th>Alcohol &amp; Substance Use Disorders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major Depressive Episode</td>
<td>Panic Disorder</td>
<td>Schizophrenia</td>
<td>Alcohol Use Disorder</td>
</tr>
<tr>
<td>Manic Episode</td>
<td>Agoraphobia</td>
<td>Schizophreniform Disorder</td>
<td>Cannabis Use Disorder</td>
</tr>
<tr>
<td>Hypomanic Episode</td>
<td>Social Anxiety Disorder</td>
<td>Schizoaffective Disorder</td>
<td>Inhalant Use Disorder</td>
</tr>
<tr>
<td>Persistent Depressive Disorder</td>
<td>Generalized Anxiety Disorder</td>
<td>Delusional Disorder</td>
<td>Other Hallucinogen Use Disorder</td>
</tr>
<tr>
<td>Major Depressive Disorder</td>
<td>Obsessive-Compulsive Disorder</td>
<td>Brief Psychotic Disorder</td>
<td>Opioid Use Disorder</td>
</tr>
<tr>
<td>Other Specified Depressive Disorder</td>
<td>Post-Traumatic Disorder</td>
<td>Other Specified Psychotic Disorder</td>
<td>Phencyclidine Use Disorder</td>
</tr>
<tr>
<td>Bipolar I Disorder</td>
<td>Stress Disorder</td>
<td></td>
<td>Sedative/Hypnotic/Anxiolytic Use Disorder</td>
</tr>
<tr>
<td>Bipolar II Disorder</td>
<td>Adult Attention-Deficit/ Hyperactivity Disorder</td>
<td></td>
<td>Stimulant Use Disorder</td>
</tr>
<tr>
<td>Other Specified Bipolar Disorder</td>
<td></td>
<td></td>
<td>Other/Unknown Substance Use Disorder</td>
</tr>
</tbody>
</table>
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 they received 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 covers a 30-day timeframe). Clinicians will then receive a report showing the clients’ change in severity for each initial diagnosis (see pages 5-6 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

Once you log in to your account, you will see the Home screen. This page includes news updates, alerting you to new updates or features. To the right are links to the user guide (be sure to check that you have the most recent version) and a link to contact TeleSage if you have any comments or questions.


- “Billing” and “Change Site” may not be shown on every account.

- The “Shrink” link simply shrinks the sidebar to only the icons. This can be useful if you are on a smaller screen. Simply click the icon again to restore the full sidebar.

The other sections are explained in more detail in this document.
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 good 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 all SAGE-SRs sent to clients in the past week, 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.
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 how reliable a particular assessment is based on the responses given to a set of validity items that are part of the assessment (this could indicate someone either overemphasizing or underemphasizing symptoms). It also indicates whether the overview and full assessment were completed and if any items were intentionally skipped.

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, where clicking it will open a pop-up box to change filters.
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.
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 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.

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### Diagnoses to consider from initial assessment (with ICD code)

<table>
<thead>
<tr>
<th>Diagnosis</th>
<th>11/01/18</th>
<th>12/15/18</th>
<th>1/30/19</th>
<th>3/02/19</th>
<th>4/16/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Anxiety Disorder (F40.10)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post-Traumatic Stress Disorder (F43.10)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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### Social Anxiety Disorder

<table>
<thead>
<tr>
<th>Assessment Date</th>
<th>11/01/18</th>
<th>12/15/18</th>
<th>1/30/19</th>
<th>3/02/19</th>
<th>4/16/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severity Score</td>
<td>7.22</td>
<td>6.39</td>
<td>6.67</td>
<td>5.56</td>
<td>5</td>
</tr>
<tr>
<td>I felt nervous or anxious when speaking to large groups of people.</td>
<td>Often</td>
<td>Often</td>
<td>Often</td>
<td>Often</td>
<td>Often</td>
</tr>
<tr>
<td>I felt nervous or anxious when eating or drinking in front of others.</td>
<td>Sometimes</td>
<td>Sometimes</td>
<td>Sometimes</td>
<td>Rarely</td>
<td>Rarely</td>
</tr>
<tr>
<td>I felt nervous or anxious at a party or social gathering.</td>
<td>Often</td>
<td>Often</td>
<td>Often</td>
<td>Sometimes</td>
<td>Sometimes</td>
</tr>
</tbody>
</table>
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. If you enter an identifier that has already been used, the year of birth will prefill and you only need to enter the client’s email address.

2. The text box to the right is prefilled with the text of the email each client will receive; however, you may customize the text of the email. Please note that the email is sent from sage@telesage.com — you may wish to customize the email so clients do not mistakenly delete the email or mark it as spam. 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; however, you may customize the text of the email. Please note that the email is sent from sage@telesage.com – you may wish to customize the email so that clients do not mistakenly delete the email or mark it as spam.

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.
**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 patient information, view patient 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.

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.

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.

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.

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.

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..

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).
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:**

<table>
<thead>
<tr>
<th># Complete Today</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td># Incomplete Today</td>
<td>1</td>
</tr>
</tbody>
</table>

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

**Average Assessments per Day:**

<table>
<thead>
<tr>
<th># of Days in Which SAGEs Were Taken</th>
<th>50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average # Complete per Day</td>
<td>2</td>
</tr>
<tr>
<td>Average # Incomplete per Day</td>
<td>1</td>
</tr>
</tbody>
</table>

**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:**

<table>
<thead>
<tr>
<th># Complete</th>
<th>140</th>
</tr>
</thead>
<tbody>
<tr>
<td># Incomplete</td>
<td>44</td>
</tr>
<tr>
<td>Average Time to Complete</td>
<td>14.96 min.</td>
</tr>
<tr>
<td>Average Time per Question</td>
<td>9.29 sec.</td>
</tr>
<tr>
<td># Diagnoses Rendered</td>
<td>334</td>
</tr>
<tr>
<td># Reports Viewed by Clinicians</td>
<td>38</td>
</tr>
</tbody>
</table>

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

The billing page displays invoices for your account and allows you to pay your bill online through PayPal.

1. Click the dropdown next to “Billing Period” to select the quarter you would like to view.
2. The invoice will display the due date and an itemized list for which you are being billed.
3. Clicking PayPal will take you to PayPal’s site where you can enter payment information. You don’t need to have a PayPal account to use this feature.

Profile

Your profile displays your user information including your National Provider Identification (NPI) if applicable, name, email address, and clinician type. Some information may be prefilled using your NPI.

You can change your password, email, or security questions by clicking the corresponding button.

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.
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.

Have questions or feedback? Contact us at sage@telesage.com