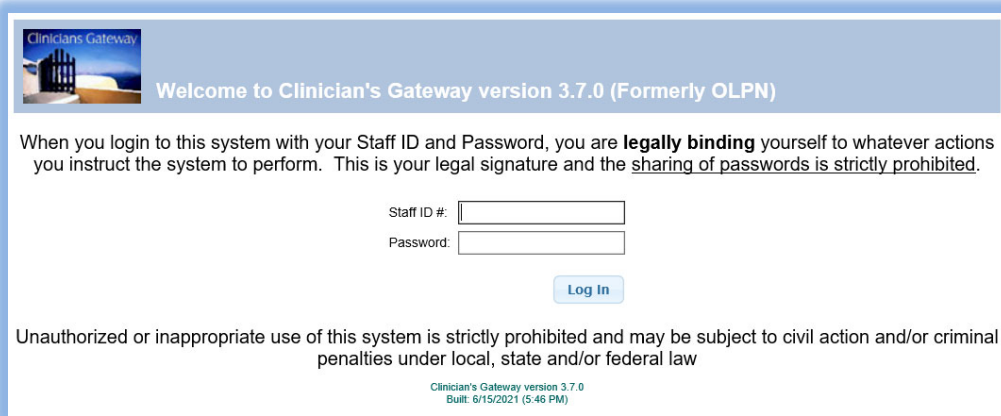
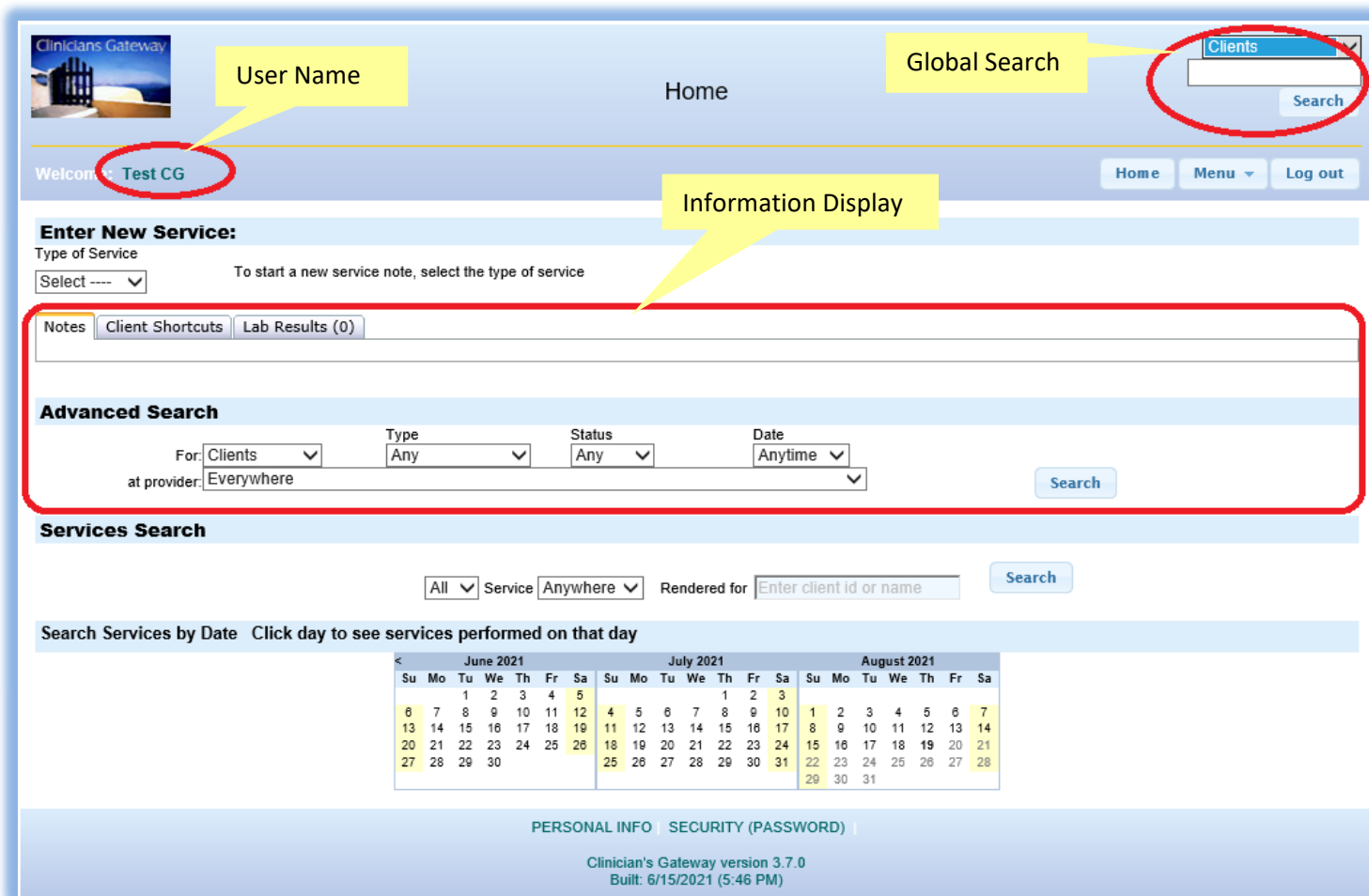


Log into CG: Under Staff ID#, you may enter your CG username or your provider #. (See Screen print below)



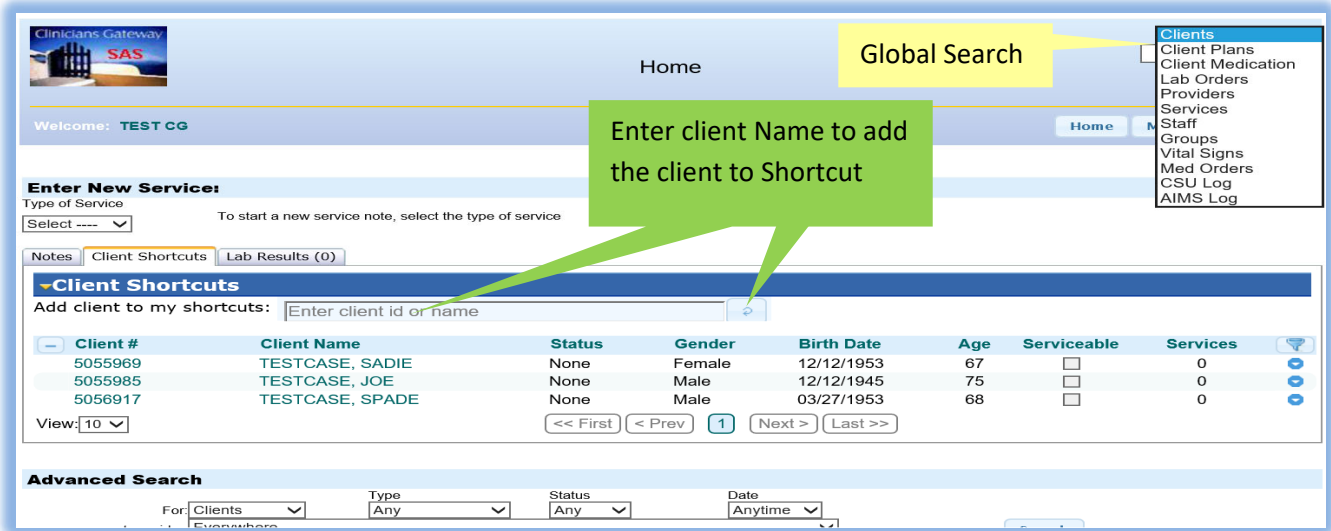
CG home screen layout part one:

- Global Search – Information Search
- User Name – may use to check your profile setting
- Information Display (Currently, there are three tabs):
  - Notes – List current draft/pending documents
  - Client Shortcuts – Setup by user to display most frequent seeing client
  - Lab results – Display lab order result (MHS Only)



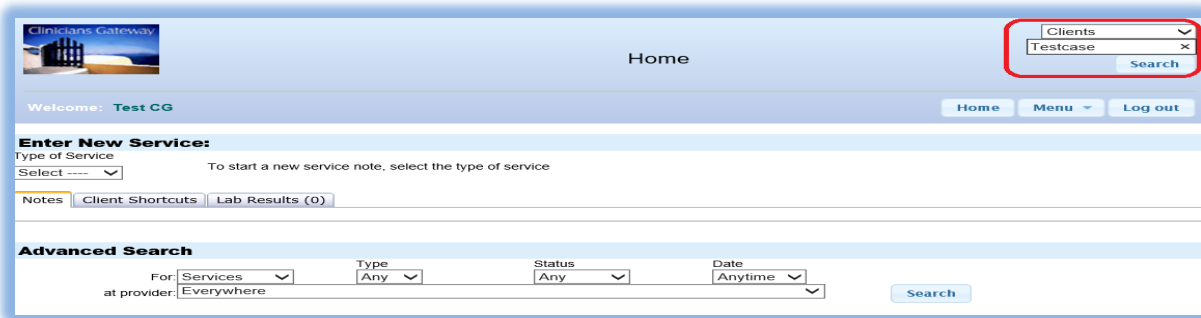
CG home screen layout part two:

- Global Search – Search any information within the system from the list.
- Client Shortcuts – adding most frequently seeing client(s) here for easy access.

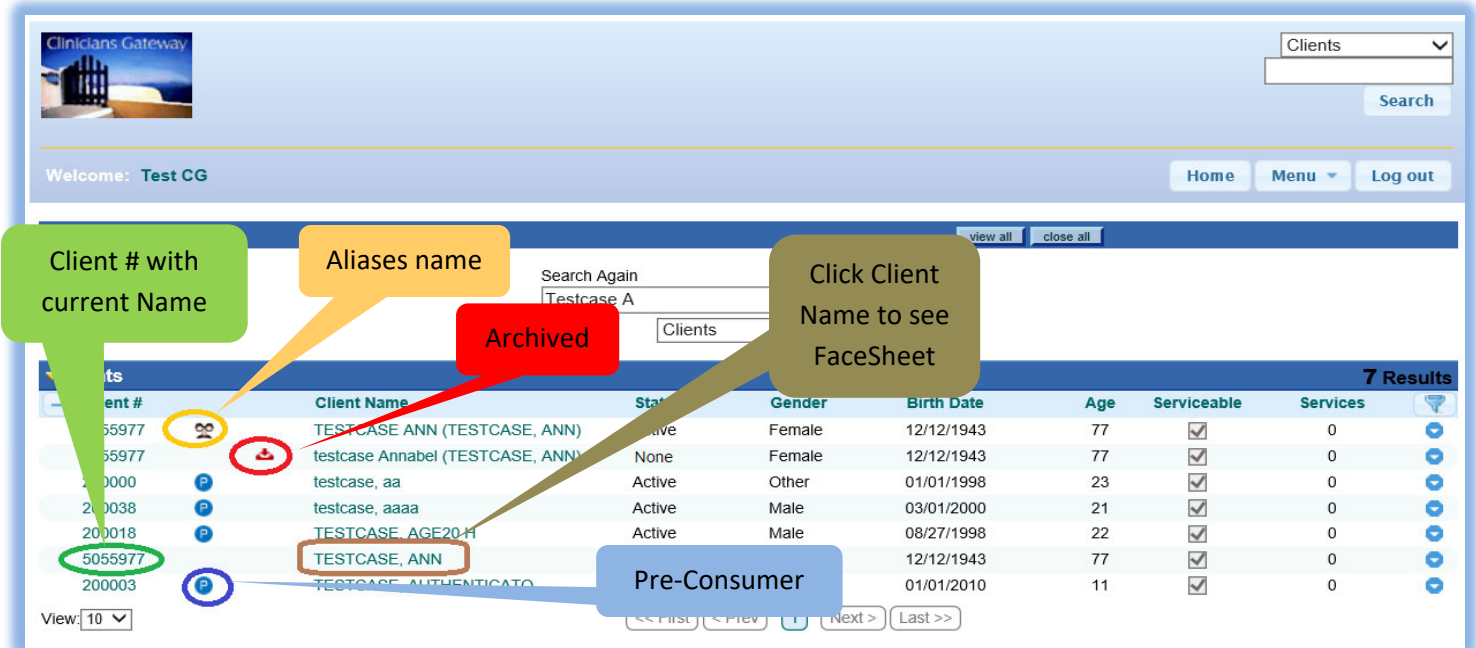


Client Search

- At Global Search, enter client last name or client #, click Search

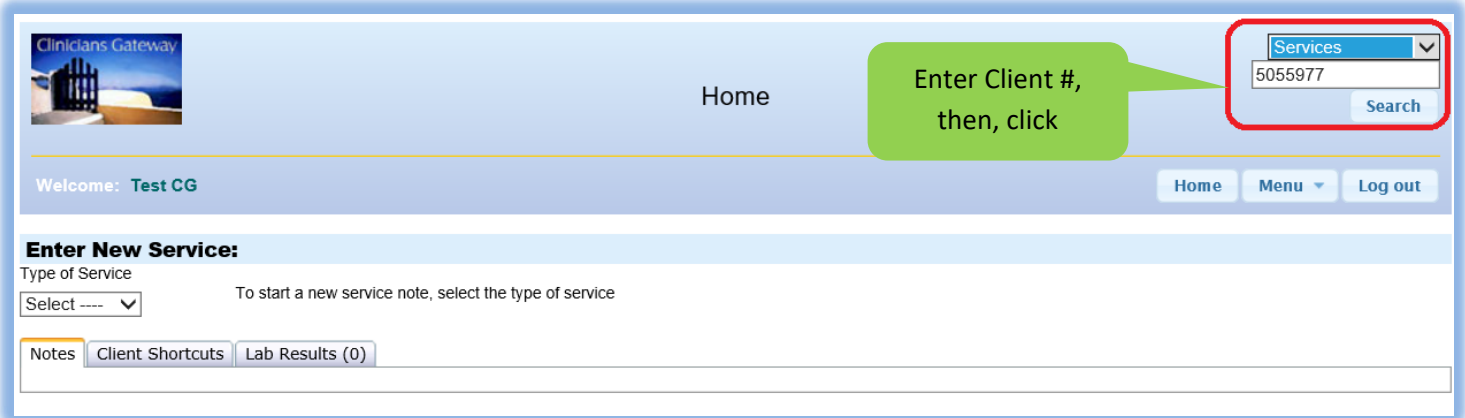


Client Search result



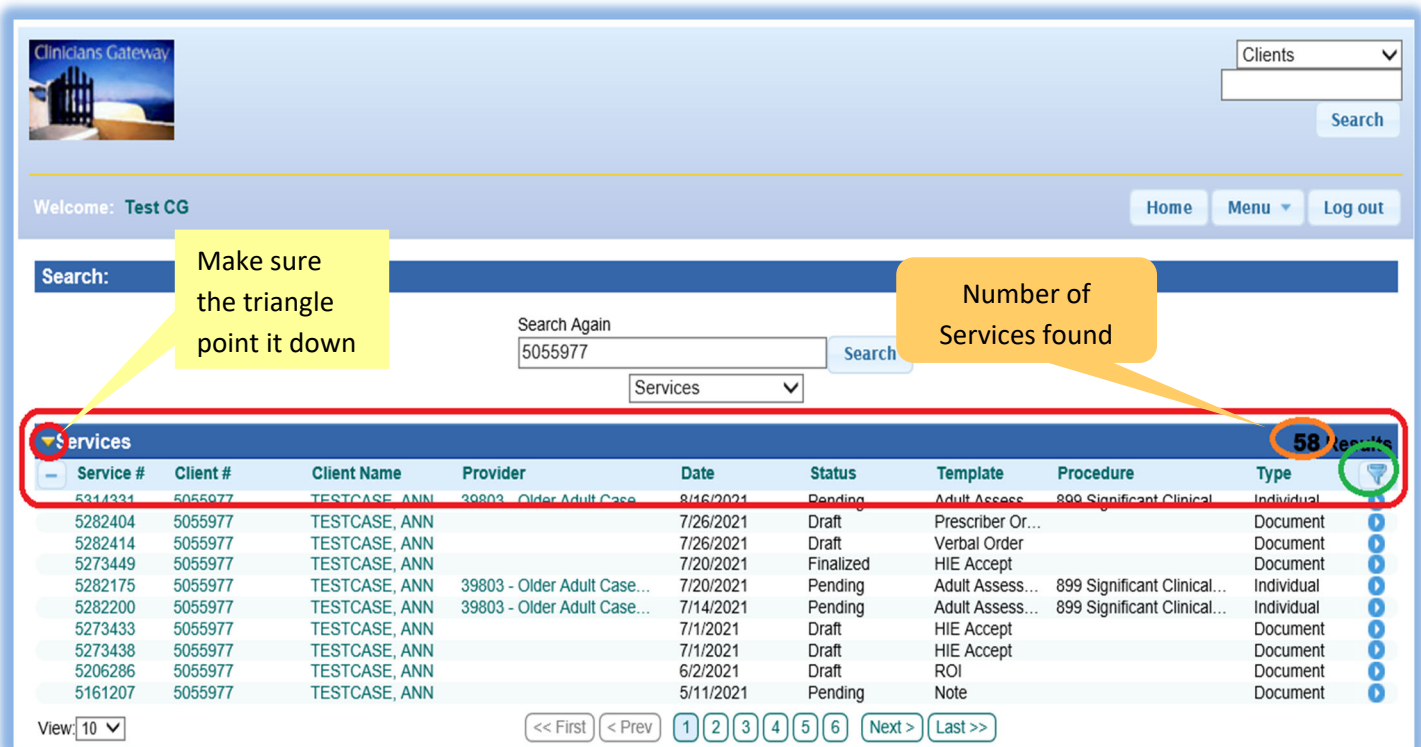
Services Search


- The best way to search a list of client's service is using client number. If you using client name for services search, the search will be very slow, and if there are multiple client with same name, the result will display multiple clients' services.
- From Global Search:
  - Select "Service"
  - Enter client #
  - Click "Search"

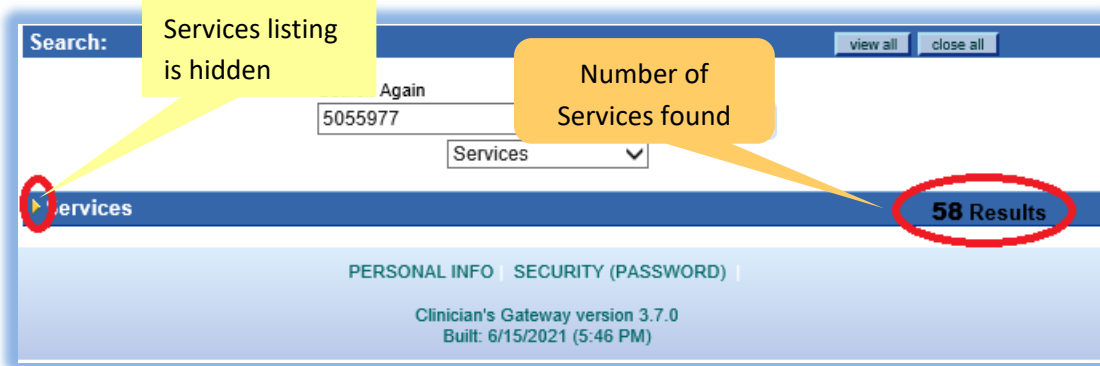


Services Listing

- The services listed on the screen as show below. Please make sure that the triangle ▼ next to the "Services" is point it down. If the triangle point to the right ▢, you asking system to hid the services listing.
- On your right hand side, system indicated # of services found from your search. (in this example, there are 58 services found)

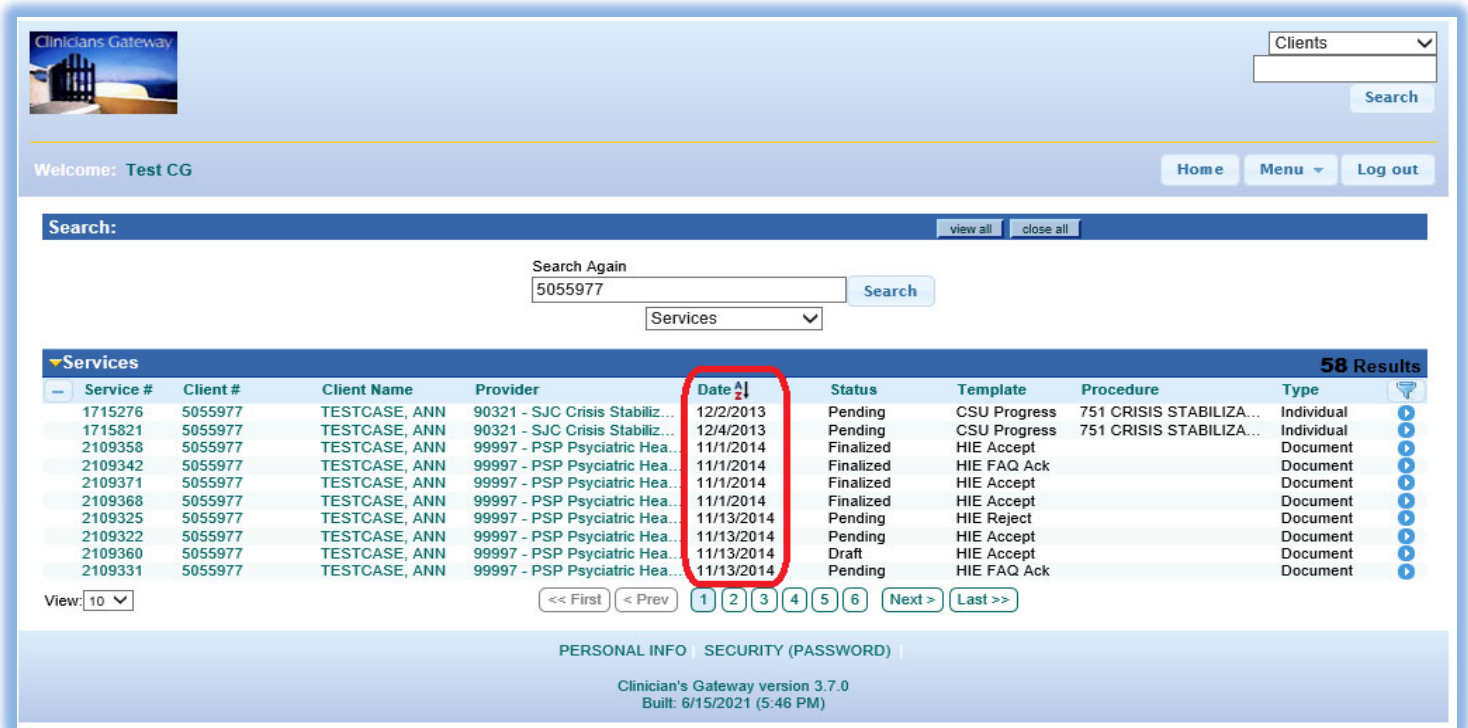


- Following screen is example that the services listing is hidden. The  triangle next to the "Services" is point to the right. On the right hand side, system indicated there are 58 services found from your search.



## Service Sorting

- From services listing screen, you may sort any column by click column name. (You may sort multiple columns.) For each column:
  - First click – Sort by ascending
  - Second click – Sort by descending
  - Third click – Sorting is off.
- Following screen shows services listing in ascending sort by date only



- Following screen services listing in descending sort by date and ascending sort by Template

Search: 5055977

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
5314331	5055977	TESTCASE, ANN	39803 - Older Adult Case...	8/16/2021	Pending	Adult Assess...	899 Significant Clinical...	Individual
5282404	5055977	TESTCASE, ANN		7/26/2021	Draft	Prescriber Or...		Document
5282414	5055977	TESTCASE, ANN		7/26/2021	Draft	Verbal Order		Document
5282175	5055977	TESTCASE, ANN	39803 - Older Adult Case...	7/20/2021	Pending	Adult Assess...	899 Significant Clinical...	Individual
5273449	5055977	TESTCASE, ANN		7/20/2021	Finalized	HIE Accept		Document
5282200	5055977	TESTCASE, ANN	39803 - Older Adult Case...	7/14/2021	Pending	Adult Assess...	899 Significant Clinical...	Individual
5273438	5055977	TESTCASE, ANN		7/1/2021	Draft	HIE Accept		Document
5273433	5055977	TESTCASE, ANN		7/1/2021	Draft	HIE Accept		Document
5206286	5055977	TESTCASE, ANN		6/2/2021	Draft	ROI		Document
5161207	5055977	TESTCASE, ANN		5/11/2021	Pending	Note		Document

Service filtering

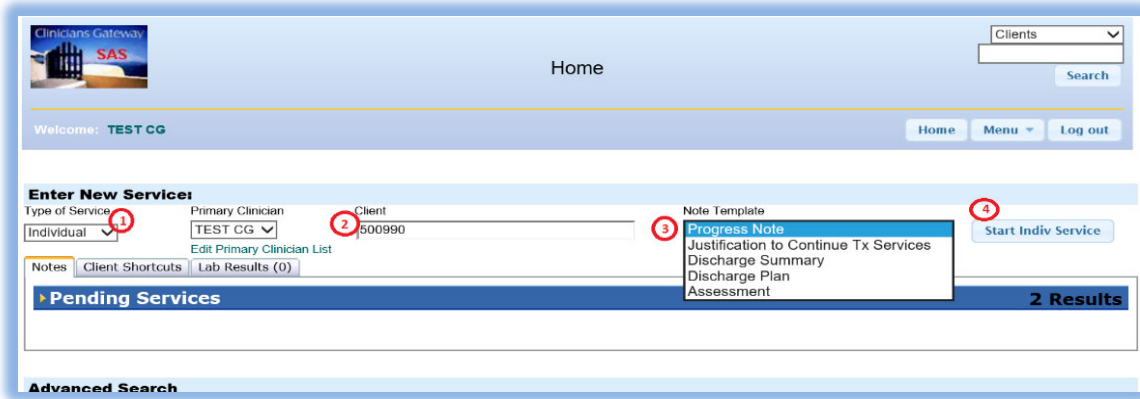
- You may setup your own filtering for the services listing by click the filter. (you may combine filter and sorting)
  - You can enter any filter requirement on the open box under each column. In this example, we entered "HIE" under Template column.
  - Then, click apply bottom to apply the filtering.
  - We also sort service listing in ascending by "Status"

Search: 5055977

Service #	Client #	Client Name	Provider	Date	Status	Template	Procedure	Type
5273438	5055977	TESTCASE, ANN		7/1/2021	Draft	HIE Accept		Document
2109360	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Draft	HIE Accept		Document
4703014	5055977	TESTCASE, ANN		7/2/2020	Draft	HIE Accept		Document
5273433	5055977	TESTCASE, ANN		7/1/2021	Draft	HIE Accept		Document
2109331	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Pending	HIE FAQ Ac		Document
2109322	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Pending	HIE Accept		Document
2109325	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Pending	HIE Reject		Document
2109371	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/1/2014	Finalized	HIE Accept		Document
2109368	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/1/2014	Finalized	HIE Accept		Document
2109358	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/1/2014	Finalized	HIE Accept		Document

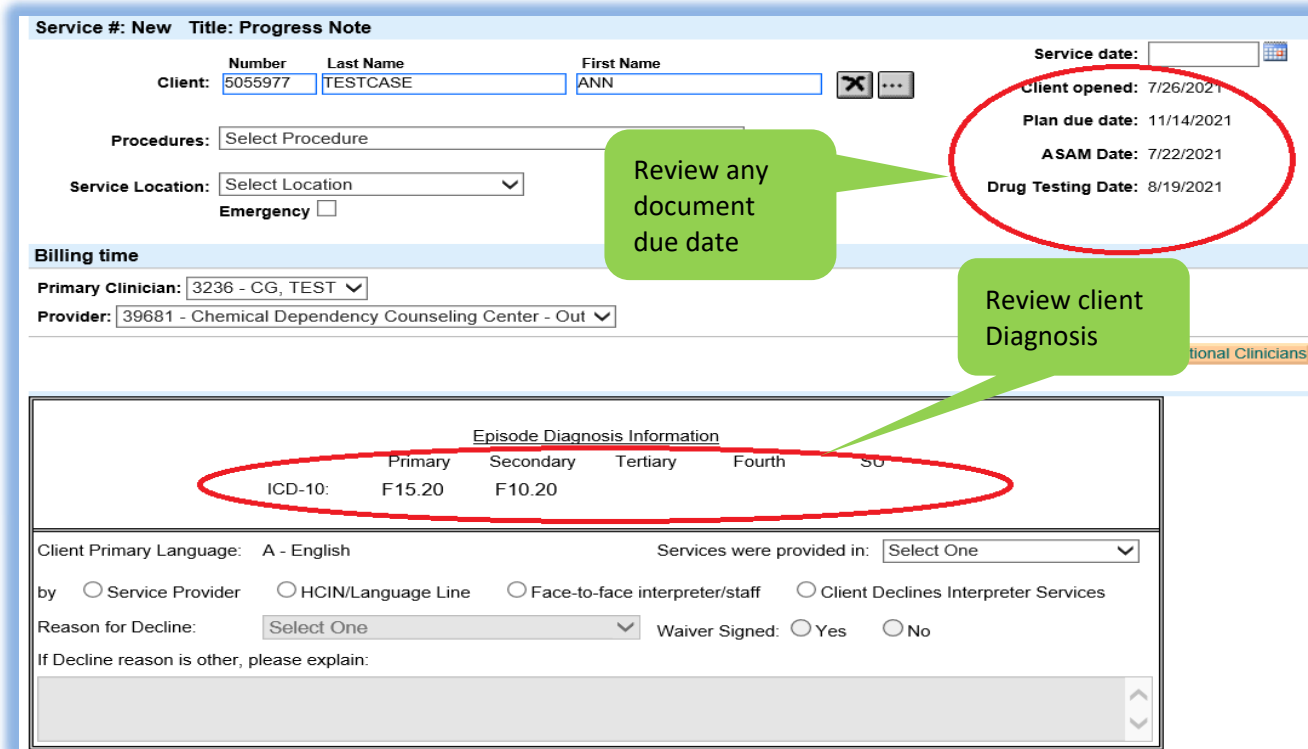
**How to start Documentation?** (This example is on how to start an individual service)

1. Select type of services: (**Individual**, Group, Indirect, Document, Client Plan)
2. Enter client #, or client Last, First Name.
3. Select note templated from the list
4. Click "Start Indiv Service".



When the progress note started, CG will display few important information about the client and document due date.

1. Client opened: client admission date (Service RU(Provider) must be selected)
2. Plan due date: Client Plan due date
3. ASAM Date: Most reason ASAM completed
4. Drug Testing Date: Most reason Drug testing
5. Last assessment: Most reason Assessment completed (coming soon)
6. Episode Diagnosis Information: verify client diagnosis is current. (Service RU(Provider) must be selected)



**NOTE:**

If any required field(s) leave blank, CG will mark it red and you will not able to finalize the note until the required filed(s) is completed. (Please see screen print below)

- To save a note in **Draft**, you need to complete the following information:
  - Entering the Service Date
  - Select Procedures from the list
  - Select the Service Location from the list
- To save a note in **Pending**, you need to complete additional information:
  - Service time
  - Time Start
  - Select language listing from "Services were provided in"
  - Check "Service Provider", "HCIN/Language Line", "Face-to-face interpreter/staff", or "Client declines interpreter Services".
  - If "Client Declines Interpreter Services" selected, you need to select "Reason for Decline", if you select decline reason as "Other", explanation is required. And click "Yes" or "No" on waiver signed.

**This service cannot be saved until the following issues are resolved:**

- \* Problem on form!
- \* Please select a procedure.
- \* Please select a treatment location.

Service #: New Title: Progress Note

Client: <table border="1" style="display: inline-table; border-collapse: collapse;"> <tr> <th>Number</th> <th>Last Name</th> <th>First Name</th> </tr> <tr> <td>5055977</td> <td>TESTCASE</td> <td>ANN</td> </tr> </table>	Number	Last Name	First Name	5055977	TESTCASE	ANN	Service date: 08/25/2021
Number	Last Name	First Name					
5055977	TESTCASE	ANN					
Procedures: Select Procedure <span style="color: red;">✖</span>	Client opened: 7/26/2021						
Service Location: Select Location <span style="color: red;">✖</span> Emergency <input type="checkbox"/>	Plan due date: 11/14/2021 ASAM Date: 7/22/2021 Drug Testing Date: 8/19/2021						

**Billing time**

Primary Clinician: 3236 - CG, TEST

Provider: 39681 - Chemical Dependency Counseling Center - Out

[Add Additional Clinicians](#)

Episode Diagnosis Information					
ICD-10:	Primary	Secondary	Tertiary	Fourth	SU
	F15.20	F10.20			

Client Primary Language: A - English

Services were provided in: Select One ✖

by ✖  Service Provider  HCIN/Language Line  Face-to-face interpreter/staff  Client Declines Interpreter Services

Reason for Decline: Select One ✖ Waiver Signed:  Yes  No

If Decline reason is other, please explain: