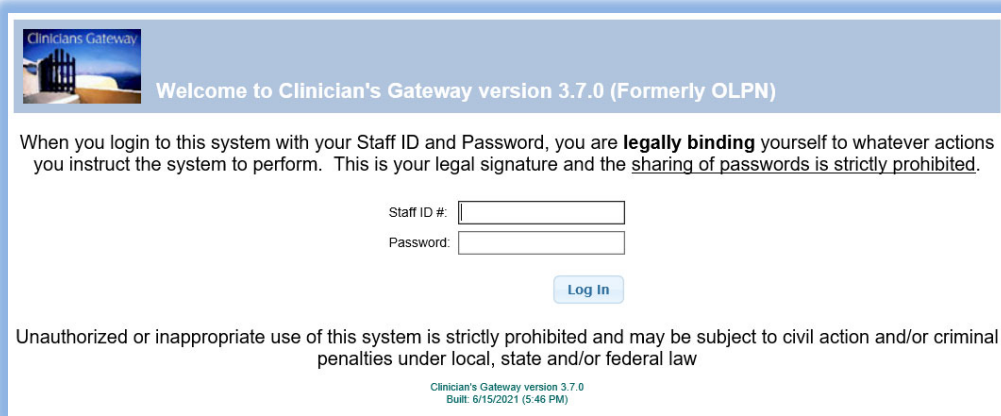**Log into CG**: Under Staff ID#, you may enter your CG username or your provider #. (See Screen print below)

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
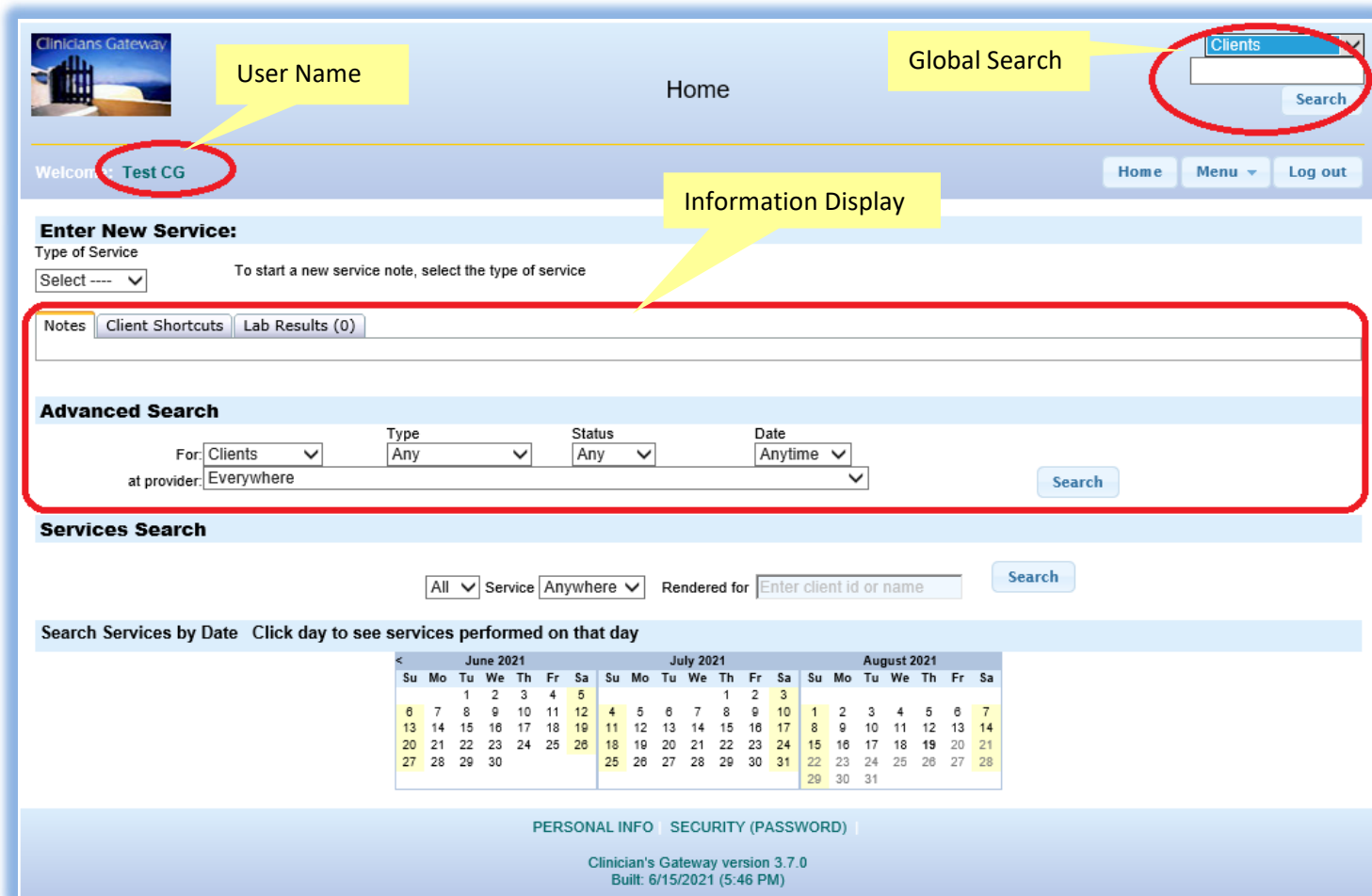
CG home screen layout part two:

- Global Search – Search any information within the system from the list.
- Client Shortcuts – adding most frequently seeing client(s) here for easy access.
- Lab results – For prescriber, system display number of new (un-reviewed) lab result(s) order by you. (in this example, lab result is 0 indicated there is not lab need to be review)

Client Search

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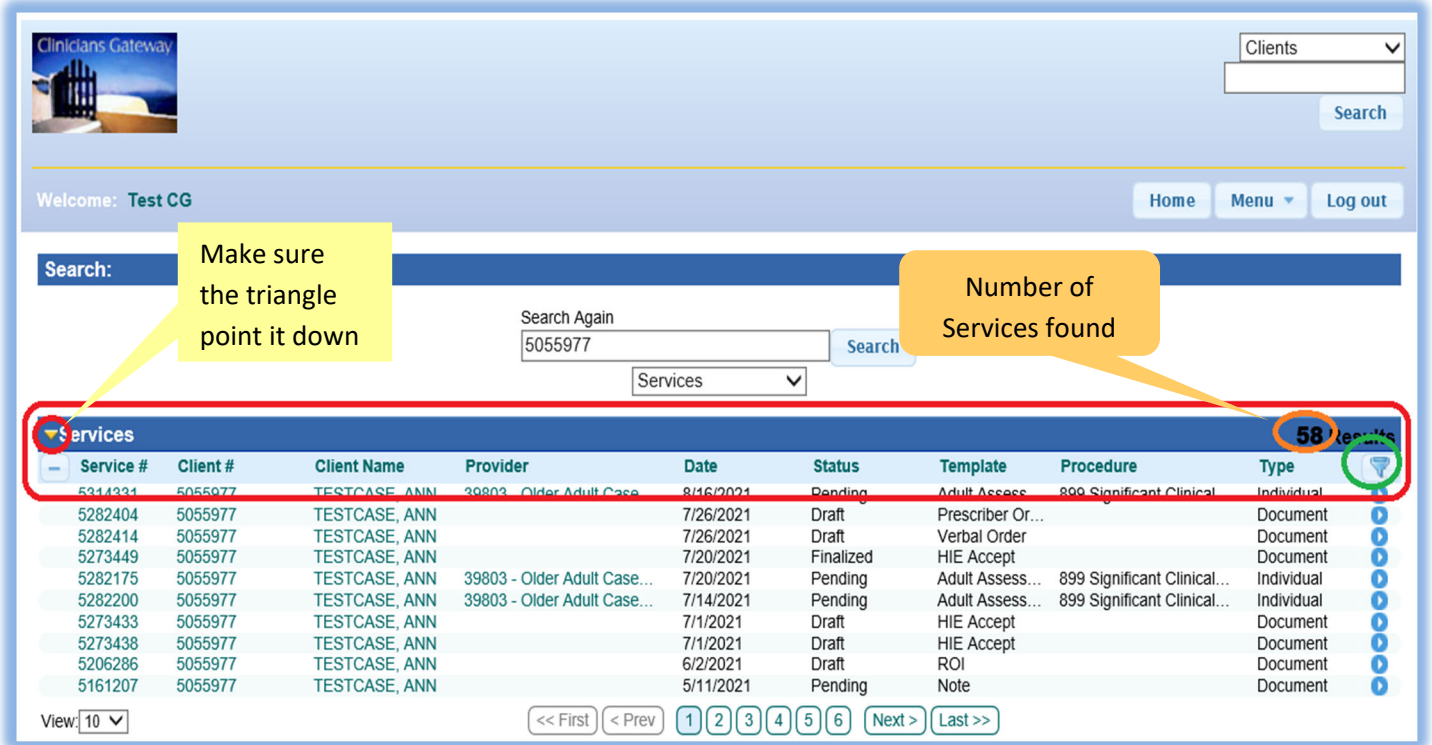
Client Search result

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"
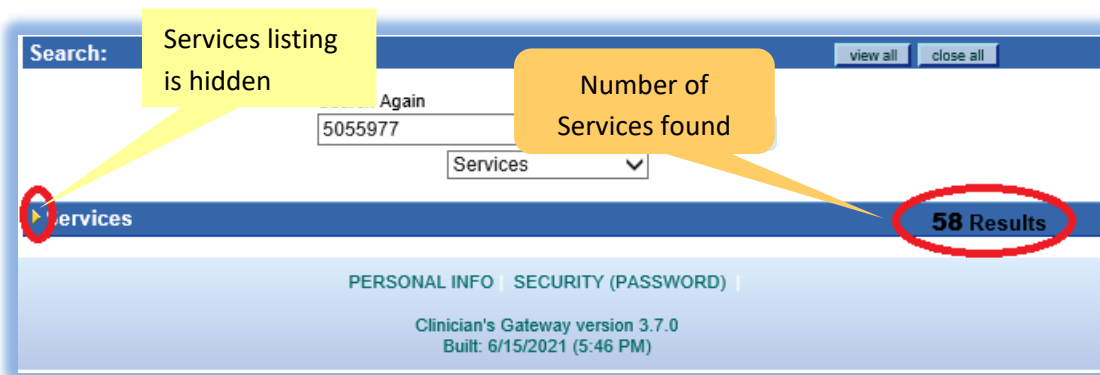
Services Listing

- 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

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"

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 (coming soon))
2. Enter client #, or client Last, First Name.
3. Select note templated from the list
4. Click "Start Indiv Service".
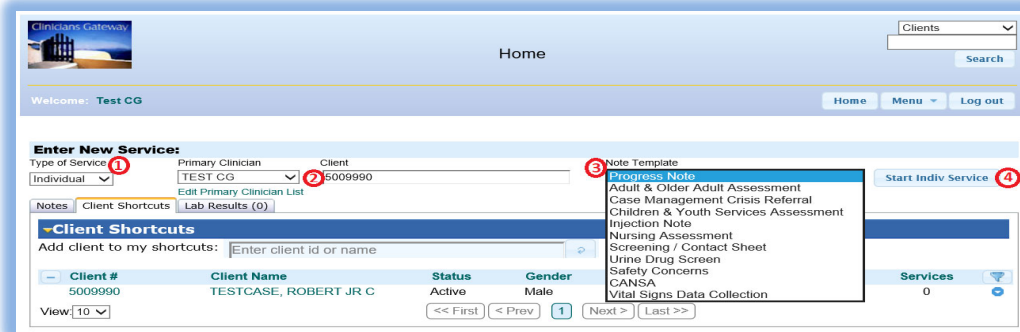
When the progress note started, CG will display few important information about the client and document due date.
1. Client opened: client admission date (Service RU(Provider) must be selected)
2. Util. review date: Client Plan due date (coming soon)
3. Last assessment: Most reason Assessment completed
4. CANSA Date: Most reason CANSA completed
5. Episode Diagnosis Information: verify client diagnosis is current. (Service RU(Provider) must be selected)
6. Review client Gender and DOB to make sure that is correct client you proivding the service.

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 singed.