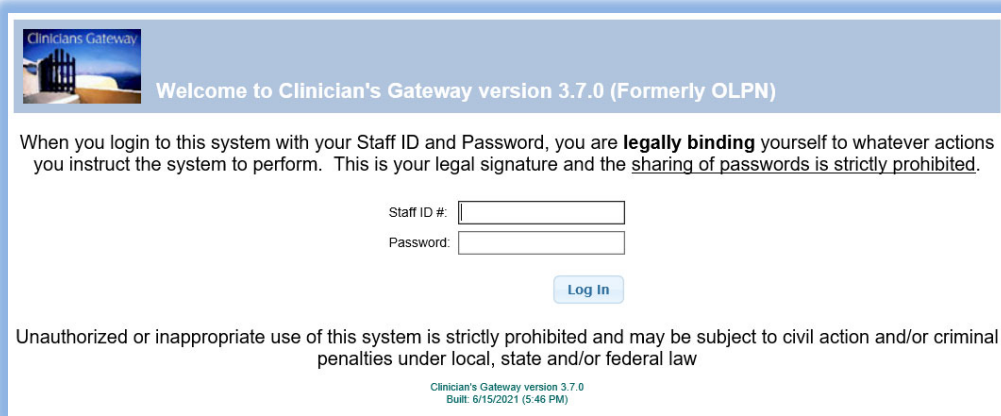
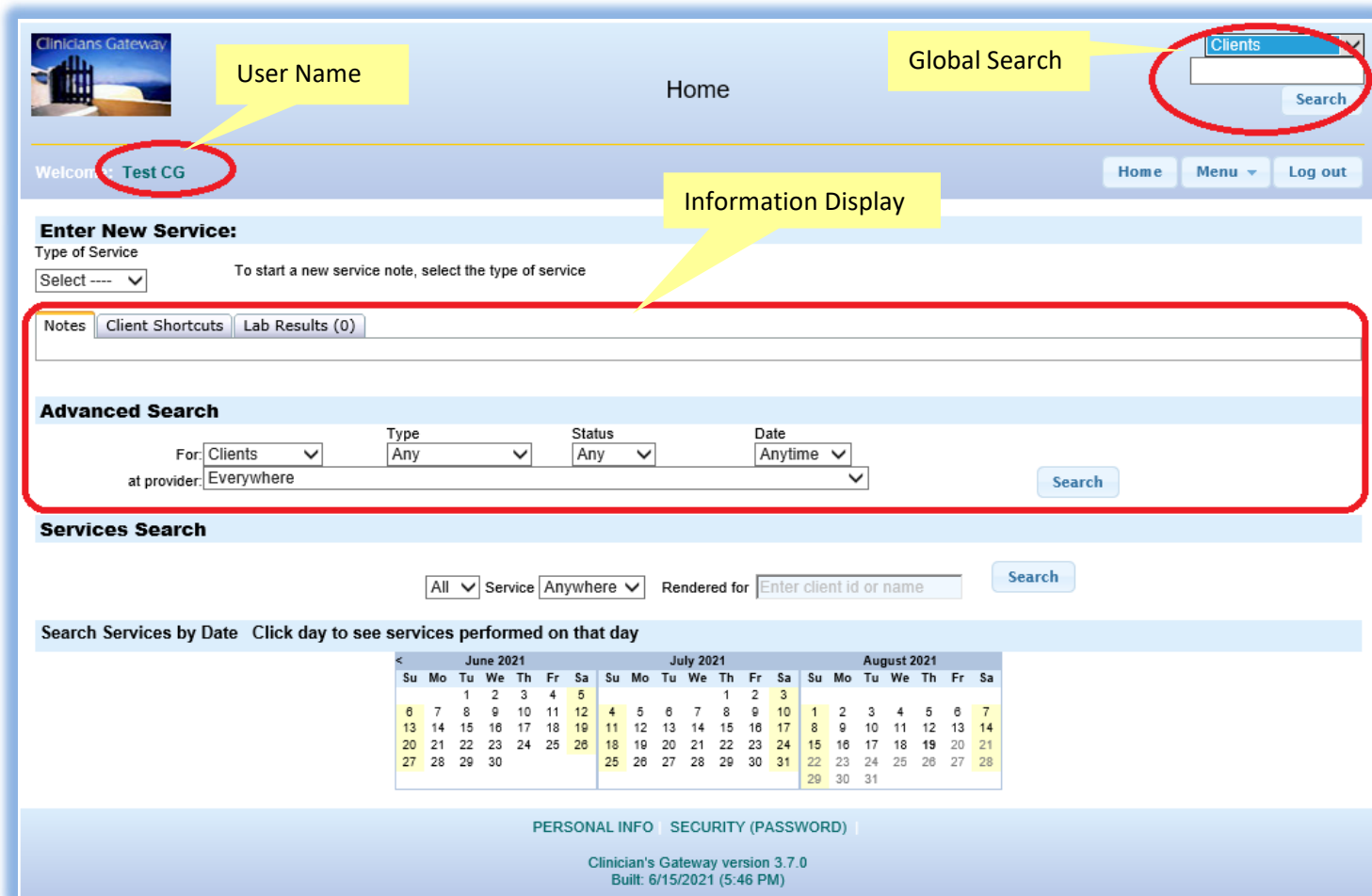


Log into CG: Under Staff ID#, you may enter your CG username or your provider #. (See Screen print below)



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)

Home Global Search

Welcome: Test CG

Enter New Service:
Type of Service: Select ----
To start a new service note, select the type of service

Notes Client Shortcuts Lab Results (0)

Client Shortcuts
Add client to my shortcuts: Enter client id or name

Client #	Client Name	Status	Gender	Birth Date	Age	Serviceable	Services
5009990	TESTCASE, ROBERT JR C	Active	Male	05/18/1948	73	<input type="checkbox"/>	0

View: 10 << First < Prev 1 Next > Last >>

Advanced Search
For: Clients Type: Any Status: Any Date: Anytime
at provider: Everywhere Search

Services Search
All Service Anywhere Rendered for: Enter client id or name Search

Search Services by Date Click day to see services performed on that day

June 2021							July 2021							August 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5	4	5	6	7	8	9	10	1	2	3	4	5	6	7
8	7	8	9	10	11	12	11	12	13	14	15	16	17	8	9	10	11	12	13	14
13	14	15	16	17	18	19	18	19	20	21	22	23	24	15	16	17	18	19	20	21
20	21	22	23	24	25	26	25	26	27	28	29	30	31	22	23	24	25	26	27	28
27	28	29	30											29	30	31				

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Client Search

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

Home

Welcome: Test CG

Enter New Service:
Type of Service: Select ----
To start a new service note, select the type of service

Notes Client Shortcuts Lab Results (0)

Advanced Search
For: Services Type: Any Status: Any Date: Anytime
at provider: Everywhere Search

Client Search result

The screenshot shows the 'Client Search' results page. At the top, there is a search bar with 'Clients' selected and a search button. Below the search bar, a 'Welcome: Test CG' message is displayed. The main content area shows a table of search results with columns for Client Name, Status, Date of Birth, Age, Serviceable, and Services. The table contains 7 results. Callouts are present: a green callout points to the client number '5055977' in the first row; an orange callout points to the aliases 'TESTCASE, ANN' in the first row; a red callout points to a red 'Archived' icon in the first row; a brown callout points to the client name 'TESTCASE, ANN' in the first row; and a blue callout points to the status 'Pre-Consumer' in the first row. A 'Search Again' box contains 'Testcase A'.



Client #	Client Name	Status	Date	Age	Serviceable	Services
5055977	TESTCASE ANN (TESTCASE, ANN)	Pre-Consumer	12/12/1943	77	✓	0
5055977	testcase Annabel (TESTCASE, ANN)	None	12/12/1943	77	✓	0
20003	testcase, aa	Active	01/01/1998	23	✓	0
20003	testcase, aaaa	Active	03/01/2000	21	✓	0
200018	TESTCASE, AGE20.H	Active	08/27/1998	22	✓	0
5055977	TESTCASE, ANN	Active	12/12/1943	77	✓	0
200003	TESTCASE, AUTHENTICATO	Active	01/01/2010	11	✓	0

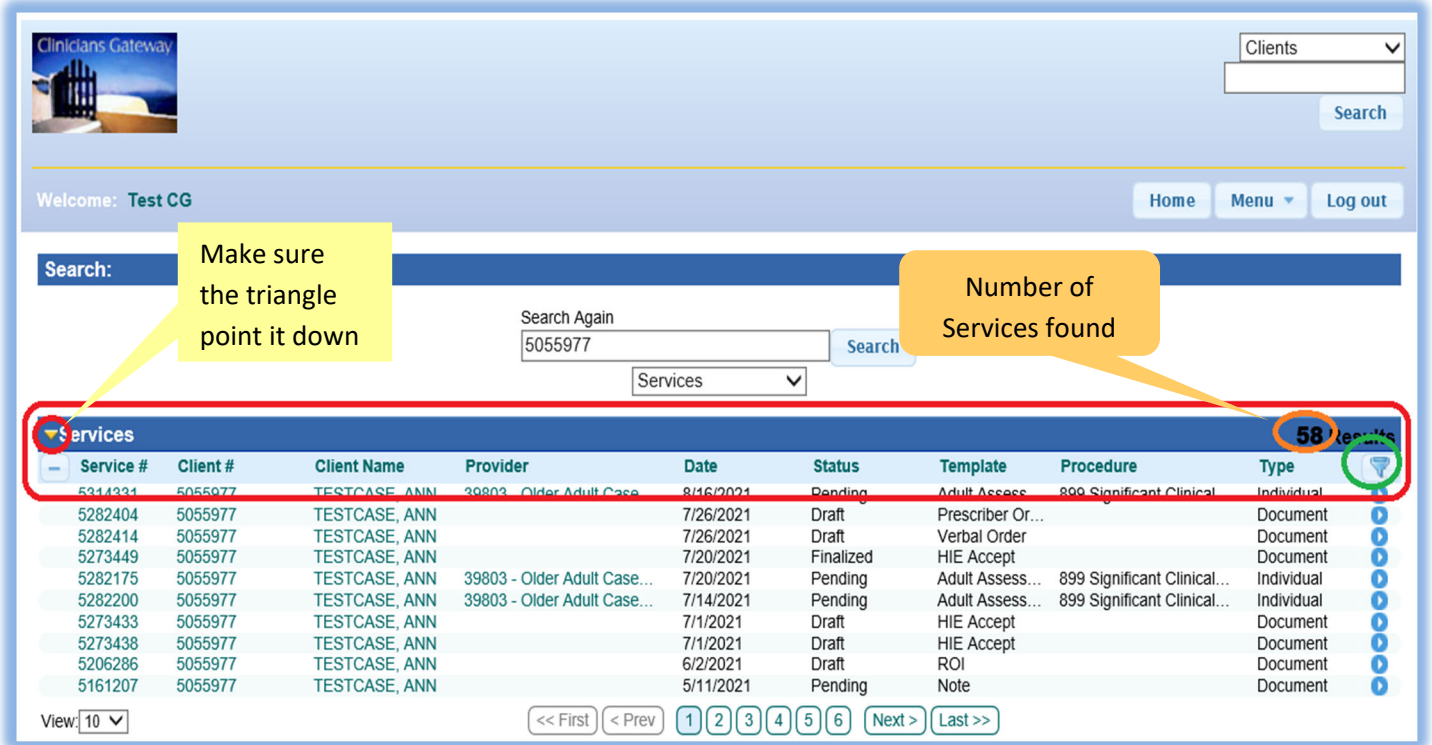
Services Search

- 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"

The screenshot shows the 'Services Search' page. At the top, there is a search bar with 'Services' selected and a search button. A green callout points to the search bar with the text 'Enter Client #, then, click'. The search bar contains the client number '5055977'. Below the search bar, there is a 'Welcome: Test CG' message. The main content area is titled 'Enter New Service:' and contains a 'Type of Service' dropdown menu with 'Select ----' selected. Below the dropdown menu, there are tabs for 'Notes', 'Client Shortcuts', and 'Lab Results (0)'. A 'Home' button is visible in the top right corner.


Services Listing

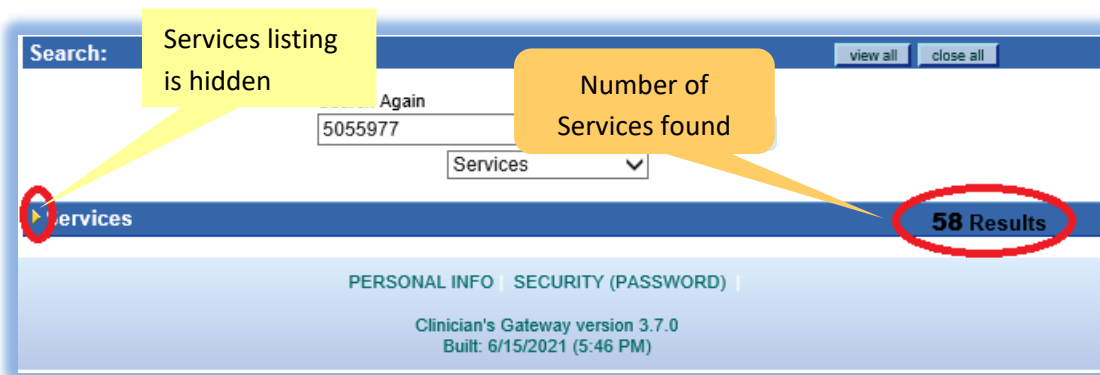
- The services listed on the screen as show below. Please make sure that the triangle  next to the "Services" is point it down. If the triangle point to the right , you asking system to hid the services listing.
- On your right hand side, system indicated # of services found from your search. (in this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



The screenshot shows the Clinicians Gateway interface. At the top, there is a search bar with the text "Search:" and a search button. Below the search bar, there is a "Search Again" section with a text input field containing "5055977" and a "Search" button. A dropdown menu labeled "Services" is visible below the search bar. A yellow callout box points to the "Services" dropdown menu with the text "Make sure the triangle point it down". Another yellow callout box points to the "58 Results" text in the top right corner of the search results area with the text "Number of Services found". The search results are displayed in a table with columns: Service #, Client #, Client Name, Provider, Date, Status, Template, Procedure, and Type. The table contains several rows of data. A red circle highlights the "Services" dropdown menu and the "58 Results" text. A green circle highlights the downward arrow next to the "Services" dropdown menu.

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

- 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.



The screenshot shows the Clinicians Gateway interface with the services listing hidden. The search bar and search button are visible. Below the search bar, there is a "Search Again" section with a text input field containing "5055977" and a "Search" button. A dropdown menu labeled "Services" is visible below the search bar. A yellow callout box points to the "Services" dropdown menu with the text "Services listing is hidden". Another yellow callout box points to the "58 Results" text in the top right corner of the search results area with the text "Number of Services found". The "58 Results" text is circled in red. The interface also shows "PERSONAL INFO | SECURITY (PASSWORD)" and "Clinician's Gateway version 3.7.0 Built: 6/15/2021 (5:46 PM)".

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

Search:

Services

Service #	Client #	Client Name	Provider	Date ↑	Status	Template	Procedure	Type
1715276	5055977	TESTCASE, ANN	90321 - SJC Crisis Stabiliz...	12/2/2013	Pending	CSU Progress	751 CRISIS STABILIZA...	Individual
1715821	5055977	TESTCASE, ANN	90321 - SJC Crisis Stabiliz...	12/4/2013	Pending	CSU Progress	751 CRISIS STABILIZA...	Individual
2109358	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/1/2014	Finalized	HIE Accept		Document
2109342	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/1/2014	Finalized	HIE FAQ Ack		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
2109325	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Pending	HIE Reject		Document
2109322	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Pending	HIE Accept		Document
2109360	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Draft	HIE Accept		Document
2109331	5055977	TESTCASE, ANN	99997 - PSP Psychiatric Hea...	11/13/2014	Pending	HIE FAQ Ack		Document

View: 10

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

Search:

Services

Service #	Client #	Client Name	Provider	Date ↓ (r)	Status	Template ↑ (z)	Procedure	Type
5314331	5055977	TESTCASE, ANN	39803 - Older Adult Case...	8/16/2021	Pending	Adult Assess...	899 Significant Clinical...	Individual
5282404	5055977	TESTCASE, ANN	39803 - Older Adult Case...	7/26/2021	Draft	Prescriber Or...		Document
5282414	5055977	TESTCASE, ANN	39803 - Older Adult Case...	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	39803 - Older Adult Case...	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	39803 - Older Adult Case...	7/1/2021	Draft	HIE Accept		Document
5273433	5055977	TESTCASE, ANN	39803 - Older Adult Case...	7/1/2021	Draft	HIE Accept		Document
5206286	5055977	TESTCASE, ANN	39803 - Older Adult Case...	6/2/2021	Draft	ROI		Document
5161207	5055977	TESTCASE, ANN	39803 - Older Adult Case...	5/11/2021	Pending	Note		Document

View: 10

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Service filtering

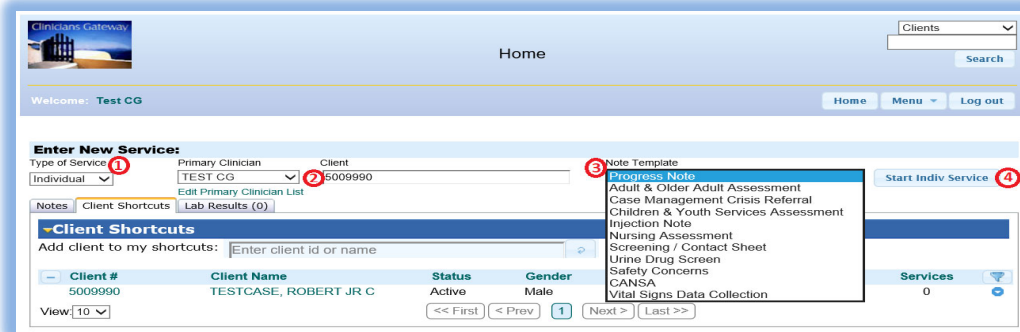
- You may setup your own filtering for the services listing by click the filter. (you may combine filter and sorting)
 - You can enter any filter requirement on the open box under each column. In this example, we entered "HIE" under Template column.
 - Then, click apply bottom to apply the filtering.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

The screenshot shows the Clinicians Gateway interface. At the top, there is a search bar with the text "5055977" and a "Search" button. Below the search bar, there are navigation buttons: "Home", "Menu", and "Log out". The main content area displays a table of services. The table has columns: Service #, Client #, Client Name, Provider, Date, Status, Template, Procedure, and Type. The "Status" column is sorted in ascending order, indicated by an upward arrow. The "Template" column contains the value "HIE". A filter icon is visible in the top right corner of the table. Annotations include: a yellow callout pointing to the "Status" column header with the text "Click any of column name to sort"; a red callout pointing to the "HIE" value in the "Template" column with the text "Enter the key word"; a green callout pointing to the filter icon with the text "Click the Filter"; and a yellow callout pointing to the "Apply" button at the bottom of the table with the text "Click here to apply the filter".

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 (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 providing the service.

Service #: New Title: Progress Note

Client: Number: 5055977, Last Name: TESTCASE, First Name: ANN

Service dates: Client opened: 10/1/2015, Util. review date: 10/1/2021, Last assessment: 9/4/2020, CANSA Date: 3/9/2021

Review any document due date

Review client Gender

Review client DOB

Review client Diagnosis

Episode Diagnosis Information

	Primary	Secondary	Tertiary	Fourth	SU
ICD-10:	F25.1	F60.9	F11.10		

Gender: Femal, Birthdate: 12/12/1943

Client Primary Language: J - Other Non 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:

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.

Welcome: Test CG
Home Menu Log out

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

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

Service #: New Title: Progress Note

Client:

Procedures:

Service Location:

Emergency? Pregnant?

Service date:

Client opened: 10/1/2015

Util. review date: 10/1/2021

Last assessment: 9/4/2020

CANSA Date: 3/9/2021

Billing time

Primary Clinician: Service Time:

Provider:

[Add Additional Clinicians](#)

Service Language

Time Started: <input type="text" value=""/>	<u>Episode Diagnosis Information</u>				
Hours:Minutes	Primary	Secondary	Tertiary	Fourth	SU
	ICD-10: F25.1	F60.9	F11.10		

Gender: Female Birthdate: 12/12/1943

Client Primary Language: J - Other Non English Services were provided in:

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

Reason for Decline: Waiver Signed: Yes No

If Decline reason is other, please explain:

Note Previous Entries: