CGM PinPoint™
Client Setup Packet
May 2021

CGM PinPoint™

Electronic Document Management

Table of Contents

NOTICE

CompuGroup Medical US believes the information contained in this documentation to be accurate at the time of publication and reserves the right to make improvements in the product described herein at any time and without notice.

This packet is copyrighted and contains proprietary information and may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic media or machine-readable form without written authorization from CompuGroup Medical US. The software described in this packet is the original work of the authors and is copyrighted with all rights reserved by CompuGroup Medical US.

Note: PinPoint is a product of LSSP Corporation that has been integrated for use with CGM webPRACTICE.

CGM PINPOINT INSTALLATION PROCESS-NEW INSTALL

1.   Client returns signed proposal and agreement to CGM US.

2.   CGM US sends Client Setup Packet and Technical Requirements to Client.

3.   Client returns completed forms to CGM US.

4.   CGM US submits forms to PinPoint (LSSP Corporation) for registration.

5.   CGM US schedules kick-off meeting with Client and PinPoint.

6.   Client attends online PinPoint training.

7.   Project Kick-off meeting with Client, CGM US and PinPoint.

8.   CGM US sends Structure Build spreadsheet and instructions to Client.

9.   Client returns completed spreadsheet to CGM US and PinPoint.

10.   CGM US receives Client API Activation information for PinPoint (LSSP Corporation.)

11.   CGM US connects into client's system and activates CGM PinPoint.

12.   Process is complete.

CGM PINPOINT INSTALLATION PROCESS-CGM EDOCS CONVERSION

1 Client returns signed proposal and agreement to CGM US.

2 CGM US sends Client Setup Packet and Technical Requirements to Client and notifies them if there will be a data transfer needed.
- **Hosted Client**: CGM US prepares hard drive with eDOCS files for PinPoint
- **Self-Hosted Client**: CGM US sends hard drive to client.

3 Client returns completed forms to CGM US.

4 CGM US submits forms to PinPoint (LSSP Corporation) for registration.
- **Hosted Client**: CGM US ships the hard drive with eDOCS files to PinPoint.
- **Self-Hosted Client**: CGM US contacts client, client plugs hard drive into CGM webPRACTICE server, CGM US connects into server and transfers eDOCS files to the hard drive and client mails the hard drive to PinPoint (LSSP Corporation) using FedEx ticket provided.

5 CGM US schedules kick-off meeting with Client and PinPoint.

6 Client attends online PinPoint training.

7 Project Kick-off meeting with Client, CGM US and PinPoint.

8 CGM US sends Structure Build spreadsheet and instructions to Client.

9 Client returns completed spreadsheet to CGM US and PinPoint.

10 CGM US receives Client API Activation information from PinPoint (LSSP Corporation).

11 CGM US connects into client's system and activates CGM PinPoint.

12 Process is Complete.

CGM PINPOINT DATABASE INFORMATION FORM

Complete the Database Information form, the Technical Packet and the CGM PinPoint Structure Build workbook and return them to your CGM Project Manager. This information is required <u>a minimum of three weeks prior to the estimated *go-live* date</u> to ensure a smooth installation. You will also need to assign an individual to be responsible for all CGM PinPoint activity.

Practice Name	_____	Client #	_____
Address	_____	City, ST Zip	_____
Contact	_____	Phone #	_____
Email	_____	Fax #	_____

Database Information Form

Complete one *Database Information Form* for each database in your practice that will be using CGM PinPoint. The number of users is controlled by the CGM PinPoint Services Agreement; refer to your agreement to verify the number of Users allotted.

| Database # | _____ | # of Users | _____ |
| Fileroom Name | _____ | | |

_____   _____
Client Representative Name   Date

_____   _____
Signature   Title

Zendesk Support Setup

You will need to create a Zendesk account and credentials, so that you can open support tickets and have a member of the PinPoint technical support staff quickly assist you whenever any questions or issues arise.

1. Click https://edrawer.zendesk.com
2. After clicking the link above, click "Sign in" located in the top-right of the screen.
3. When the window appears, click "Sign up" located on the left side to create your free Zendesk account.
4. After you have created your free Zendesk account, you MUST verify a confirmation email that will be sent to you from Zendesk. Once you confirm your email, you can submit a support ticket at any time. Please provide as much detail as you can in your support tickets.