CGM Direct Scanning™
Client Setup Packet

February 2023

CGMwebPRACTICE™

Fully Web-Based Practice Management Suite

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CGM DIRECT SCANNING INSTALLATION PROCESS

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

2. CGM US sends *Technical Requirements* to Client.

3. Client returns completed form to CGM US.

4. CGM US connects into client's system and activates CGM Direct Scanning.

5. CGM US sends *CGM Direct Scanning Integration* instructions, *Workstation Installation Instructions* and *CGM Direct Scanning – Scan & Attach Instructions* to Client.

6. Client completes the *CGM Direct Scanning Integration* and performs the *Workstation Installation Instructions*.

7. Client returns completed forms to CGM US.

8. Client uses the *CGM Direct Scanning – Scan & Attach Instructions* to learn the functionality.

9. Process is complete.

CGM DIRECT SCANNING INFORMATION FORM

Complete the following information and the Technical Packet and return them to your CGM Implementation Consultant. 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 Direct Scanning activity and provide their contact information below.

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

User Information

Provide the CGM webPRACTICE User Codes that will use Direct Scanning. The number of users is controlled by the CGM Direct Scanning Services Agreement; refer to your agreement to verify the number of Users allotted.

User Code	_____	Username	_____
User Code	_____	Username	_____
User Code	_____	Username	_____
User Code	_____	Username	_____
User Code	_____	Username	_____
User Code	_____	Username	_____
User Code	_____	Username	_____
User Code	_____	Username	_____

_____	_____
Client Representative Name	Date
_____	_____
Signature	Title