

5.0 Clinician Quick-Start Reference

Who to Call

If you have specific questions about records, call the numbers below.

- For charts prior to September 2009, call 939-9615
- For copies of records, call 939-9702
- For coding questions, call 939-9619
- For information on completing a chart, call 939-9704
- For release of information, call 939-9702
- For charts for research, call 939-9519

Frequently Asked Questions

Why is the word “filtered” listed next to my patient’s information?

- “Filtered” appears if you have been denied access to a document type that is in the chart. You will not see any indication of which document(s) you have been denied access to see.

I created a bookmark in a patient chart, but now it is not there. What happened to it?

- Bookmarks are only temporary and not a permanent part of the chart. Each time you log off ChartMaxx any bookmarks you create will be cleared.

Where do I add an e-mail address for my recipient in Chart Messaging?

- You can only send messages to other ChartMaxx users. Chart Messaging is not a replacement for the CHS e-mail system.

If I forget my password for ChartMaxx, who can reset it for me?

- Call the Customer Support Desk at 939-6568.

How often do I have to change my password in ChartMaxx?

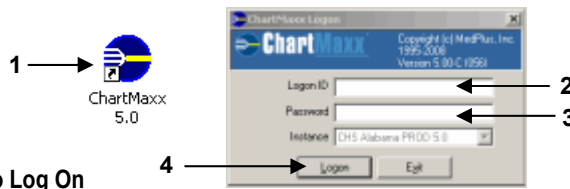
- You will be required (and prompted) to change your password every 90 days.

NOTES


For Help Contact:

CHS Customer Support Desk
939-6568 or helpdesk@chsys.org

Access Chart Navigator




To Log On

1. Double-click the desktop ChartMaxx icon.
2. In the *Logon ID* box, type your logon ID.
3. In the *Password* box, type your password.
4. Click *Logon*.
5. On the *Main Menu*, click .


Search for a Chart or Folder

To Search for a Chart or Folder

1. Click  to retrieve a chart or folder.
2. Click the *Basic*, *Advanced*, *My Patients*, *Folder*, or *Import* tab to select a search type.
3. Type search criteria.
4. Click *Search*.
5. Click the chart or folder.
6. Click *Retrieve*.

Bookmark Documents

To Add a Bookmark

1. Scroll through the document until you find the page you want to bookmark.
2. While viewing the correct page, click .

To View a Bookmark

1. Locate the bookmark in the chart table of contents for the page that you want to reference.
2. Click the bookmark.

Return Charts

On the application menu bar, click  or *Return* on the menu bar and:

- *Return Selected Chart.*
- *Return All Charts for Patient.*
- *Return All Charts.*

Change Password

To Change Your Password(s)

1. On the ChartMaxx *Main Menu*, click *Setup > Security*.
2. In the *Change Logon Password* area, type old and new logon passwords and confirm the change.
3. In the *Change Signature Password* area, type old and new signature passwords and confirm the change.
4. Click *OK*.

Chart Messaging

To Check for New Messages

















1. Log onto ChartMaxx.
2. In the *Chart Messaging Status* area on the *Main Menu*, check the number of unread messages that appear.
3. Click  from the *Main Menu*, *Chart Navigator*, or *Chart Completion*.

Chart Messaging Toolbar Buttons

Icon	Definition
	Click to open the <i>New Message</i> dialog box where you can compose and send a new message to another ChartMaxx user.
	Click to delete any message from your inbox or sent items.
	Click to forward any message in your inbox.
	Click to respond to any message in your inbox.

Document Viewer Toolbar Buttons








Icon	Definition
	Click to move up through the pages and documents in the same chart.
	Click to move down through the pages and documents in the same chart.
	Click to rotate the scanned image 90° clockwise.
	Click to inspect a document more closely by enlarging a selected section of the image.
	Click to decrease the viewing size of the document.
	Click to position one complete page of the document into the viewing window.
	Click to find key words and phrases in a text document.
	Click to display additional information about the document.
	Click to view the current document in a separate window.
	Click to bookmark a page in a document.
	Click to make changes to (edit or annotate) documents.



Remember:

You are responsible for what is done while logged in with your Logon ID in ChartMaxx. ALWAYS log off or use the lock feature when stepping away from the computer for any length of time.

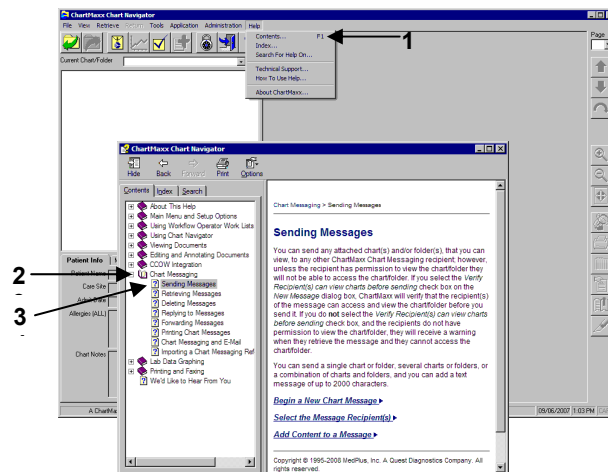
Patient and Chart Icons

Icon	Definition
	Indicates that this patient has a Disclosure Restriction.
	Indicates this chart is incomplete.
	Indicates this chart is legally complete.
	Indicates this chart is linked to another chart.
	Indicates a Restricted chart.
	Indicates a chart that has been marked as Confidential. (Use for VIPs, celebrities, etc.)
	Indicates a Denied chart, meaning you do not have view access.



ChartMaxx Help

ChartMaxx help provides assistance that you can access as you work in any ChartMaxx application.

Each ChartMaxx application contains help files that provide an overview of the application, a description of what you can do in the application, and step-by-step instructions for completing specific tasks. You can access application help from an application's main window. When you access application help, you can browse topics, use an index to locate a topic, or search for a specific topic.



To Browse the Online Help

1. On the application menu bar, click *Help > Contents*.
2. Double-click a book (), or click the plus/minus icon next to it, to expand or collapse a book
3. Click any listed book or topic ().

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