CONTACT INFORMATION

ChartMaxx Access

Please contact the ITS Help Desk at (559) 353-7300.

ChartMaxx Technical Support

Please contact our Systems Support Specialist, Christie Slonski at (559) 353-5408 or at cslonski@childrenscentraleal.org.

Remote Users

If you are having difficulty accessing our system through Citrix/Portal, please contact the ITS Help Desk at (559) 353-7300.
To Log On
1. Double-click the desktop ChartMaxx icon.
2. Type your Logon ID.
3. Type your Password.
4. Click Logon.
5. On the Main Menu, click

Search for a Chart
To Search for a Chart
1. Click to retrieve a chart.
2. Click Basic or Advanced to select a search type, and then enter search criteria.
3. Click Search
4. Select the chart.
5. Click Remove

Completion Navigator

To Check your Completion Status
1. Check the total number of Deficiencies and the number of Delinquent deficiencies that appear in the Completion Status display in Main Menu.
2. If applicable, review your User Status.

To Access Completion Navigator
4. On the application menu bar, click Application > Completion.
5. Select deficiency type(s).
6. Click
7. Review and complete deficiencies as needed.

To Complete Deficiencies
Review each deficiency, and do one of the following:
- Click or
- Edit the document and click
- Provide the missing document and click
- Dictate the document, type the Job ID, and click
- Read the document and click
- Click and select a reason.

Add Documents

To Add a New Document
1. On the application menu bar click File > Add Document.
2. Click and select an Available Document Type.
3. Click and select an Event Date and Time.
4. Click the Create a New Document option.
5. Click
6. As applicable, use the word processing tools.

To Import a New Document
1. On the application menu bar click File > Add Document.
2. Click and select an Available Document Type.
3. Click and select an Event Date and Time.
4. Click the Create from File Import option.
5. Click
6. Use the standard Windows dialog box to find the document on your hard drive and then click Open.
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 TOC for the page that you want to reference.
2. Click the bookmark.

Edit and Annotate Documents

To Edit a Text or RTF Document
1. Click.
2. Use the word processing tools to make changes.
3. When finished, click again.
4. Click to save your changes.

To Edit/Annotate a Scanned Document
1. Click.
2. Use the Edit and Annotation Tools to make changes.
3. When finished, click again.
4. Click to save your changes.

Return Charts
On the application menu bar, click Return and:
- Return Selected Chart.
- Return All Charts for Patient.
- Return All Charts.

Change Password

To Change Your Password(s)
2. Enter old and new logon passwords and confirm the change.
3. Enter old and new signature passwords and confirm the change.
4. Click.

Chart Messaging

To Check for New Messages
1. Log onto ChartMaxx.
2. Check the number of Unread messages that appear in the Chart Messaging Status display in Main Menu.
3. Click when in Chart Navigator or Chart Completion.

Document Viewer Toolbar Buttons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>↑</td>
<td>Click to move up through the pages and documents in the same chart.</td>
</tr>
<tr>
<td>↓</td>
<td>Click to move down through the pages and documents in the same chart.</td>
</tr>
<tr>
<td>🔍</td>
<td>Click to inspect a document more closely by enlarging a selected section of the image.</td>
</tr>
<tr>
<td>🔍</td>
<td>Click to decrease the viewing size of the document.</td>
</tr>
<tr>
<td>🔍</td>
<td>Click to find key words and phrases in a text document.</td>
</tr>
<tr>
<td>📣</td>
<td>Click to print if you have permission to print.</td>
</tr>
<tr>
<td>📚</td>
<td>Click to view the current document in a separate window.</td>
</tr>
<tr>
<td>📚</td>
<td>Click to bookmark a page in a document.</td>
</tr>
<tr>
<td>📚</td>
<td>Click to make changes to (edit or annotate) documents inside the document viewer.</td>
</tr>
</tbody>
</table>
NEW FEATURES & ENHANCEMENTS

Job ID Prompt

ChartMaxx now prompts the physician for a Job ID if the physician did not enter one prior to clicking the Dictated button in Chart Completion.

Resolve a Dictation Deficiency

1. Click the My Deficiencies tab.
2. Select the Dictation Deficiency.
3. Dictate the document, enter the Job ID provided by the transcription system (if applicable), and then click Dictated to indicate that you have dictated the document.

Note: If a Job ID is already associated with the Dictation deficiency, it will display in the Job ID field.

You will be prompted to enter the Job ID if you did not do so prior to clicking Dictated. If you do not know the Job ID, click OK to close the prompt.

Toggle Layout

This gives the user the ability to toggle between two different chart viewing modes, Vertical or Horizontal.

To Invoke Horizontal View Mode

1. On the application menu bar click View > Toggle Layout.

Horizontal View

Vertical View

Disclosure Restriction

New Icon

1. A new icon has been added to ChartMaxx to indicate that a patient has requested that his/her protected Health Information not be disclosed.