ChartMaker® Mobile User Guide

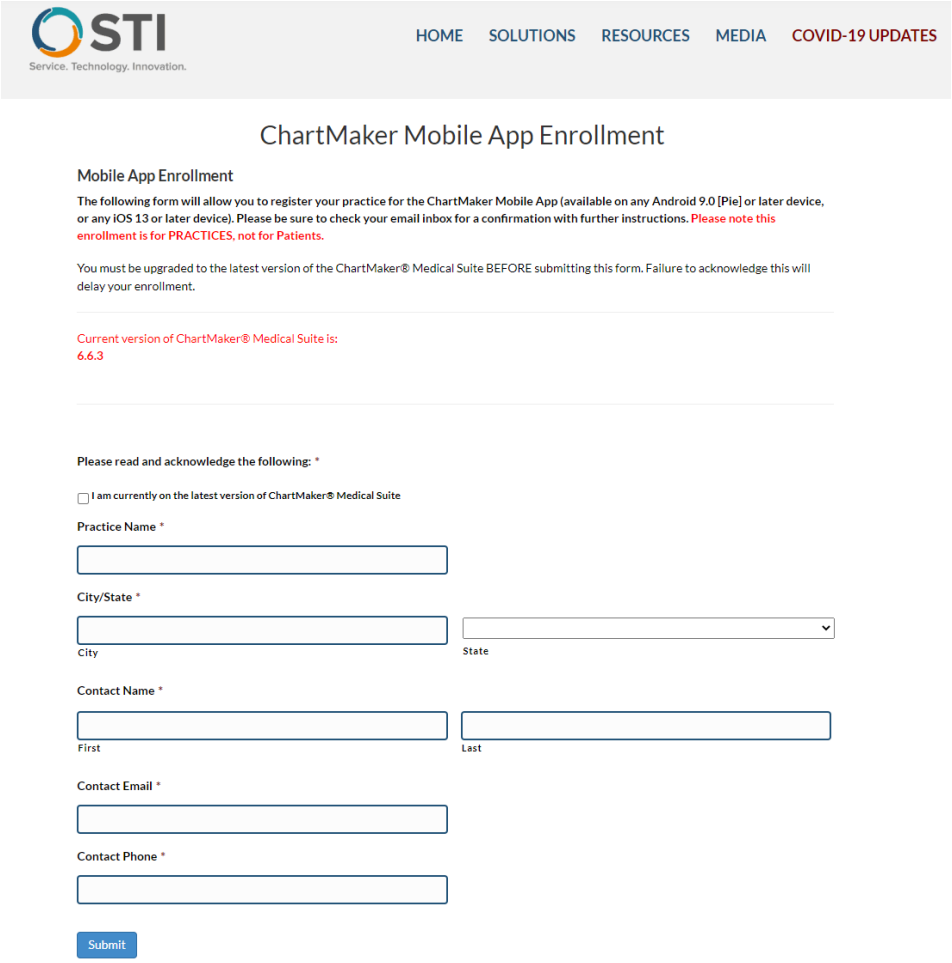
Contents

ChartMaker® Mobile Enrollment

Prior to configuring any information in the ChartMaker Medical Suite for ChartMaker® Mobile, or using the mobile app itself, you must complete the online enrollment for ChartMaker® Mobile. The mobile app is compatible with any Android 9.0 (Pie) or later device, or any iOS 13 or later device. Likewise, to enroll, you must be using the latest version of the ChartMaker® Medical Suite. User the following steps to complete the enrollment process.

> **!!! Warning!!!**
> You may be able to run the latest version of ChartMaker Mobile on Android and iOS versions older than those indicated above (Android 9.0 (Pie) or later device, or any Apple iOS 13 or later device). However, we do not recommend running on any older operating systems (OS) than those previously mentioned, as these older OS can no longer be updated with security updates, thereby putting your patient's health data at risk and open to vulnerabilities, and not being HIPAA compliant.

1. Access the Mobile App Enrollment at: http://sticomputer.com/mobile-app-enrollment/.
2. Check the **I am currently on latest version of ChartMaker® Medical Suite** option.
3. Enter your **Practice Name**, **City/State**, **Contact Name**, **Contact Email**, and **Contact Phone** in the corresponding fields.
4. When finished, click the **Submit** button. You will receive an email confirmation as well as instructions sent to the email address entered in the Contact Email field. A STI Support Representative will be in contact with you shortly.



ChartMaker Mobile

The ChartMaker Mobile module, in Clinical and Practice Manager, allows you to access the Mobile Administration dialog (where you can administer users, and the practices they have access to, for ChartMaker® Mobile, as well as to view the Mobile Audit Trail) and the New Patients From ChartMaker Mobile dialog (where you can view those patients that have been added via ChartMaker® Mobile that have not been activated in Practice Manager yet). The following sections will detail how to access the Mobile Administration and the New Patients From ChartMaker Mobile dialogs and use the functionality therein.

Mobile Administration

The Mobile Administration dialog, in Clinical and Practice Manager, allows you to administer users, and the practices they have access to, for ChartMaker® Mobile, as well as to view the Mobile Audit Trail. Only users that have the Mobile Administration privilege are allowed access to the Mobile Administration dialog. The following sections will detail configuring the Mobile Administration privilege that allows users access to the Mobile Administration dialog, where you can then register new users and modify enrolled users for ChartMaker® Mobile, as well as view the Mobile Audit Trail.

CONFIGURE MOBILE ADMINISTRATION PRIVILEGE

The Mobile Administration privilege allows the selected user the ability to access the Mobile Administration dialog and administer users and practices for ChartMaker® Mobile, as well as to view the Mobile Audit Trail, in the Clinical application. There are two levels of privilege for the Mobile Administration privilege: **None** (cannot access or administer mobile administration capabilities) and **Authorized** (is authorized to access and administer mobile administration capabilities).

Use the following steps to configure the Mobile Administration privilege for a user.

1. In Clinical, click **Edit** > **System Tables** > **Users**.

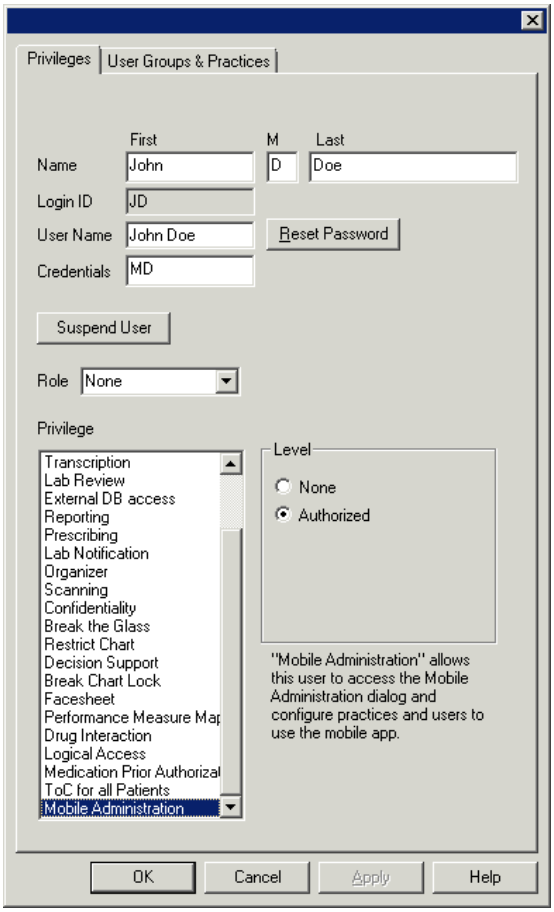
   *****NOTE*****
   Practice Manager-only users do not need to configure the Mobile Administration privilege for users. However, to access the Mobile Administration dialog in Practice Manager, users must have Practice Manager Administration Rights.

2. In the Users dialog, double-click the **User** you want to configure the Mobile Administration privilege for.

3. Click the **Privileges** tab.

4. Highlight the **Mobile Administration** privilege, and then click the **Authorized** radio button.

5. When finished, click the **OK** button.



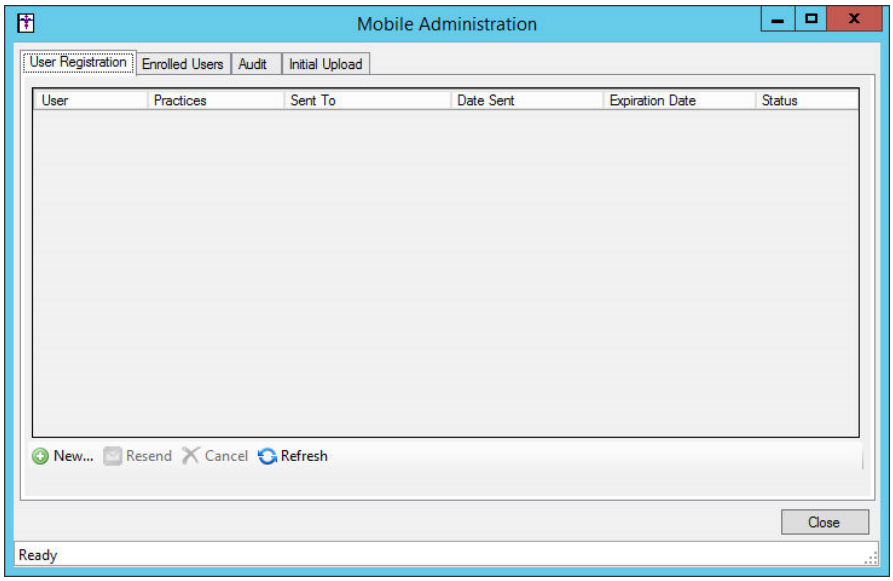
REGISTER A NEW USER FOR CHARTMAKER® MOBILE

The User Registration tab of the Mobile Administration dialog allows you to register new users for the ChartMaker® Mobile, resend the registration email for the user to complete the registration process, as well as cancel the registration process for a user. After a user has successfully completed the registration process, they will no longer be listed in the User Registration tab, but can be accessed in the Enrolled Users tab.

Use the following steps to register a new user for ChartMaker® Mobile.

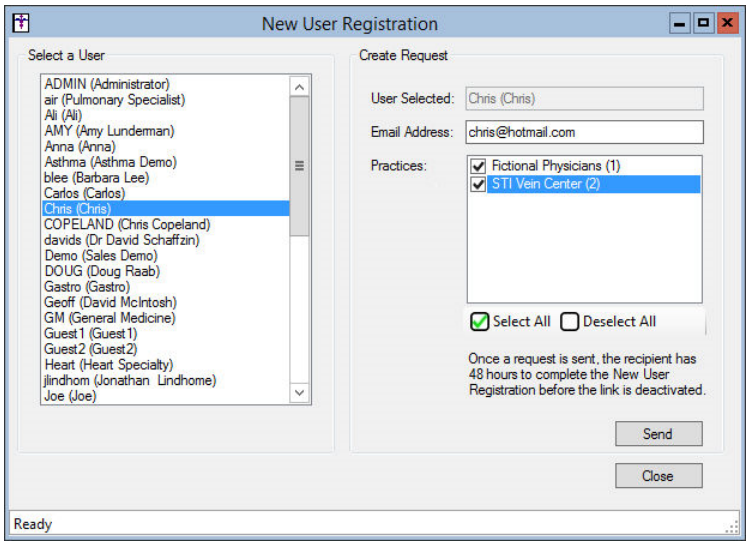
1. In Clinical, click **Edit** > **System Tables** > **Mobile** > **Mobile Administration**. In Practice Manager, click **Administration** > **Mobile** > **Mobile Administration**.

2. In the Mobile Administration dialog, click the **User Registration** tab, and then click the **New...** button.



3. In the Select a User section of the New User Registration dialog, select the **User** you want to register for ChartMaker® Mobile.

4. After the desired user has been selected, enter their **Email Address**, and then select the **Practice(s)** they should have access to for ChartMaker® Mobile.



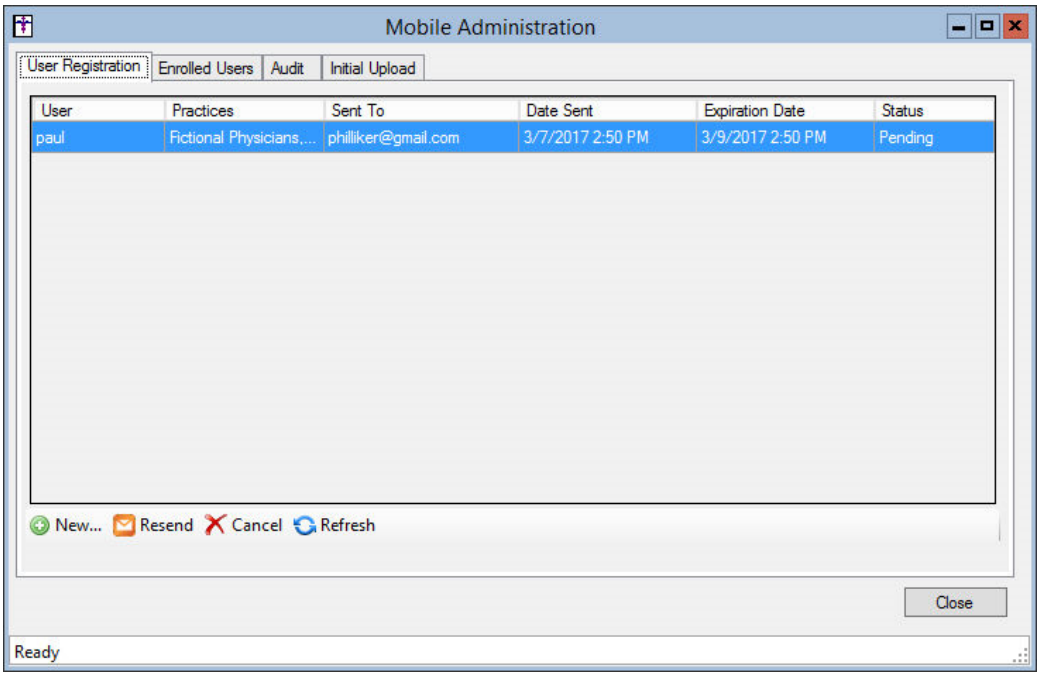
5. Click the **Send** button. A registration email will then be sent to the user's Email Address entered in step 4 that allows the user to complete the registration process by entering a password and directions for downloading ChartMaker® Mobile.

   *****NOTE*****
   If the user does not receive the registration email within a few minutes, have them check their spam, junk, or trash folder. The email may be routed there depending upon their email settings.

6. The user will then be listed in the User Registration tab. When a user's registration status is pending, you can resend the registration email, as well as cancel their registration process.

   To resend the registration email, highlight the applicable **User**, and then click the **Resend** button. The registration email will then be resent to that user.

   To cancel the registration for a user, highlight the applicable **User**, and then click the **Cancel** button. The user's registration will then be canceled, and they will be removed from the User Registration list. They can be registered again if needed.



7. When finished, click the **Close** button to exit the Mobile Administration dialog.

Modify Practices that Users can Access, Unlock a User, & Deactivate Users for ChartMaker® Mobile

The Enrolled Users tab of the Mobile Administration dialog allows you to view the enrolled users for the ChartMaker® Mobile, modify the practices that users have access to, unlock a user, as well as deactivate users.

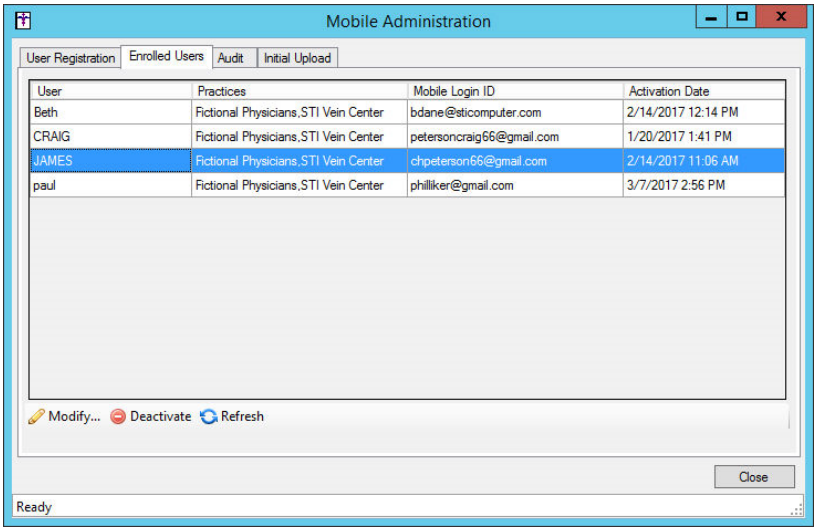
Use the following steps to modify, unlock, and/or deactivate an enrolled user for ChartMaker® Mobile.

1. In Clinical, click **Edit** > **System Tables** > **Mobile** > **Mobile Administration**. In Practice Manager, click **Administration** > **Mobile** > **Mobile Administration**.

2. In the Mobile Administration dialog, click the **Enrolled Users** tab.

3. The enrolled users will be listed in the Enrolled Users tab. Click the **Refresh** button to refresh the list of enrolled users.

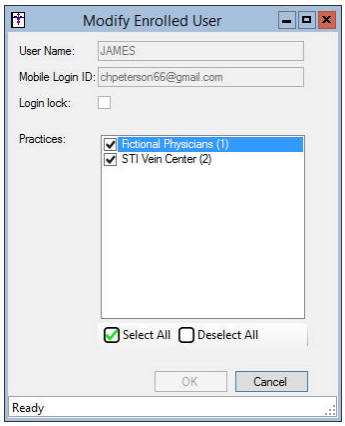
4. To modify the practices that a user has access to, or to unlock a user whose login become locked, highlight the applicable **User**, and then click the **Modify** button.



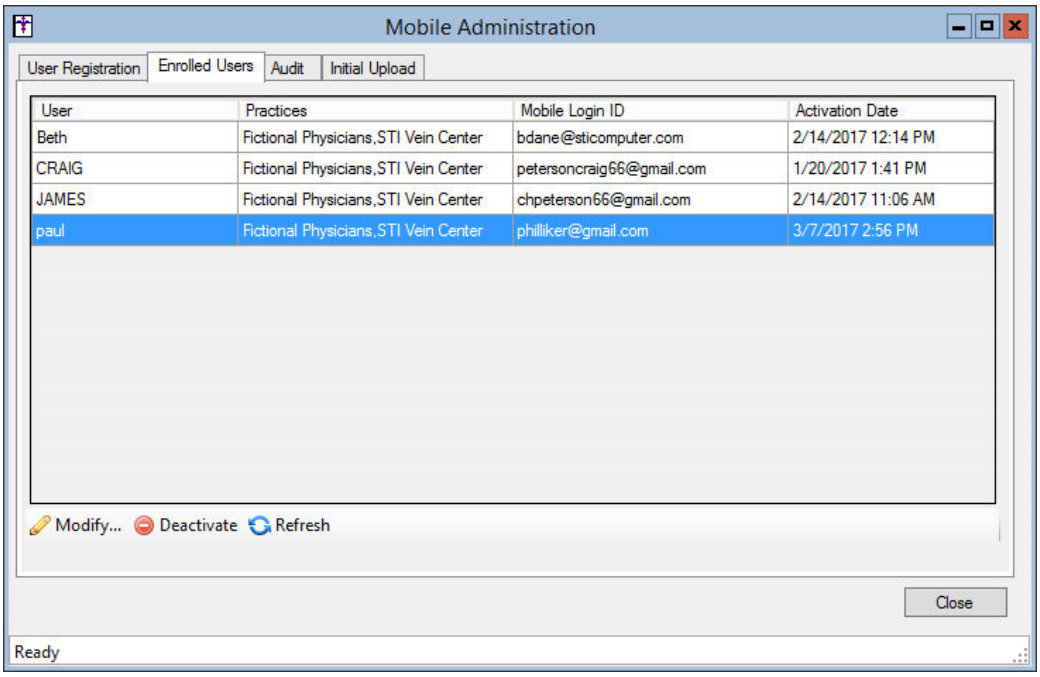
5. In Modify Enrolled User dialog, check the **Practices** that the user should have access to, or uncheck those **Practices** they should no longer have access to.

6. If the **Login lock** option is checked that user was locked out of their account because they failed to successfully login into ChartMaker® Mobile after five attempts. To unlock their account, uncheck this option.

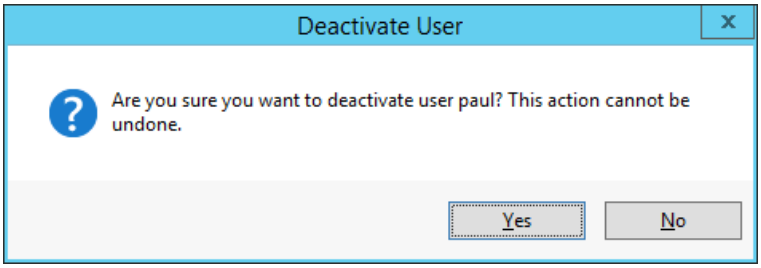
7. When finished configuring information in the Modify Enrolled User dialog, click the **OK** button.



8. To deactivate a user, highlight the applicable **User** in the Enrolled Users tab, and then click the **Deactivate** button.



9. A Deactivate User dialog will appear confirming you want to deactivate the selected user. Click the **Yes** button. That user will then be deactivated and removed from the Enrolled Users tab.



10. When finished, click the **Close** button to exit the Mobile Administration dialog.

VIEW THE MOBILE AUDIT TRAIL

The Audit tab allows you to view all the audit events for the ChartMaker® Mobile. When viewing audit information, you can filter audit events for a date range, a user, an activity type, and a patient account number. Use the following steps to view the audit information for the ChartMaker® Mobile.

1. In Clinical, click **Edit** > **System Tables** > **Mobile** > **Mobile Administration**. In Practice Manager, click **Administration** > **Mobile** > **Mobile Administration**.

2. In the Mobile Administration dialog, click the **Audit** tab.

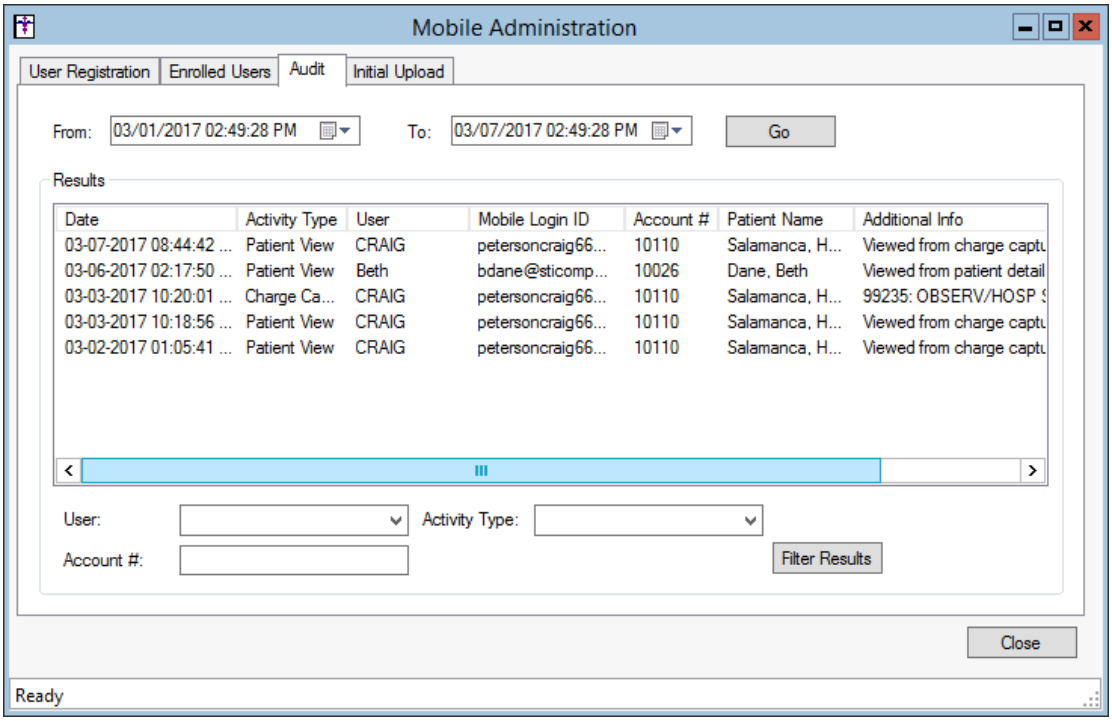
3. Modify the **From** and **To** fields, and then click the **Go** button if you want to view audit events for a date range.

4. Select a **User** to view audit events for a specific user.

5. In the Activity Type field, select the **Activity Type** (Charge Capture, New Patient, or Patient View) you would like to view audit events for. Leaving this field blank will display audit events for all applications.

6. In the Account # field, enter the **Account Number** for a patient if you only want to see audit events for that patient.

7. When finished configuring the filter options (User, Activity Type, and/or Account #), click the **Filter Results** button. The applicable audit information will then be displayed.



8. When finished, click the **Close** button to exit the Mobile Administration dialog.

View New Patients From ChartMaker® Mobile

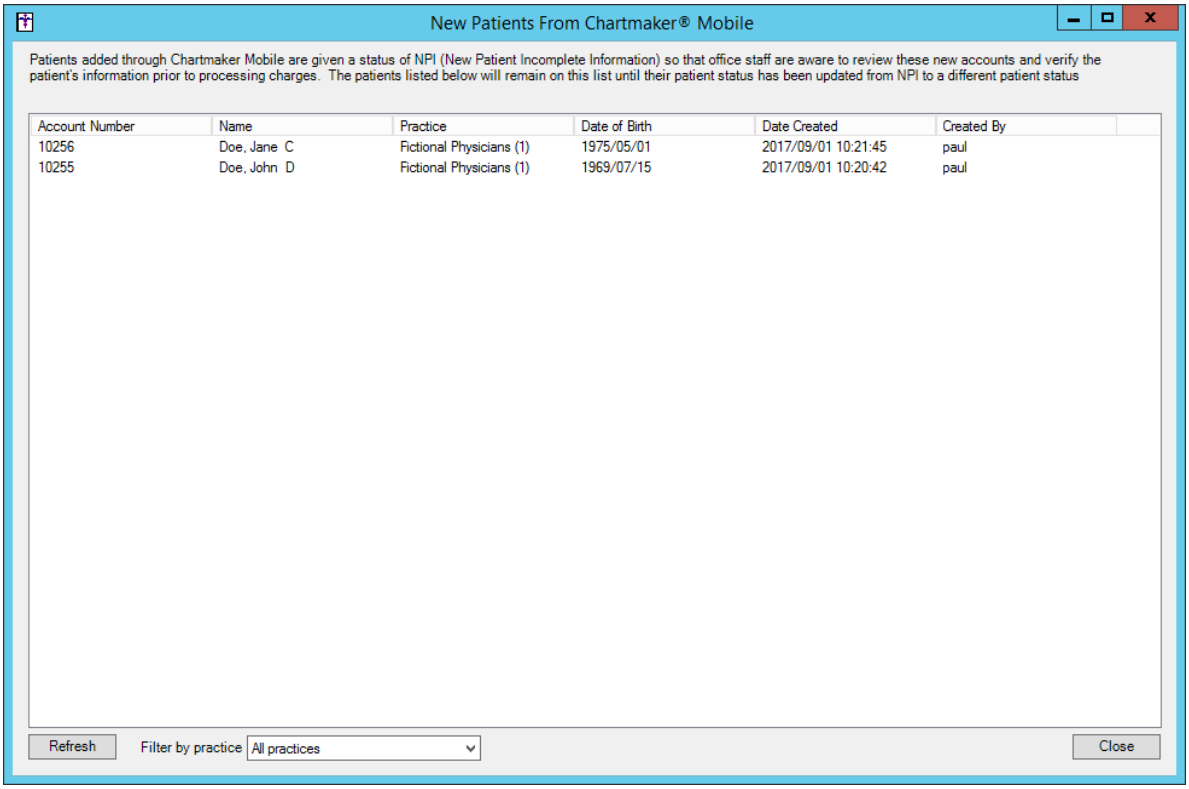
The New Patients From ChartMaker® Mobile dialog allows you to easily view all patients that were created in ChartMaker® Mobile (requires ChartMaker® Mobile version 6.2.4 or higher). When new patients are added through the mobile app, they are given a status of NPI (New Patient Incomplete Information), and need to be activated in Practice Manager prior to processing any pending charges. Patients will remain listed in this dialog until their status has been updated in Practice Manager. Use the following steps to view new patients created in ChartMaker® Mobile.

1. Click **Administration** > **Mobile** > **New Patients**.

2. In the New Patients From ChartMaker® Mobile dialog all new patients that were added via ChartMaker® Mobile, and have still have a status of NPI, will be listed. You can filter the list for a specific practice by selecting the applicable **Practice** in the **Filter by practice** field, if needed.

3. Click the **Refresh** button to refresh the list of new patients.

4. When finished, click the **Close** button to exit the New Patients From ChartMaker® Mobile dialog.



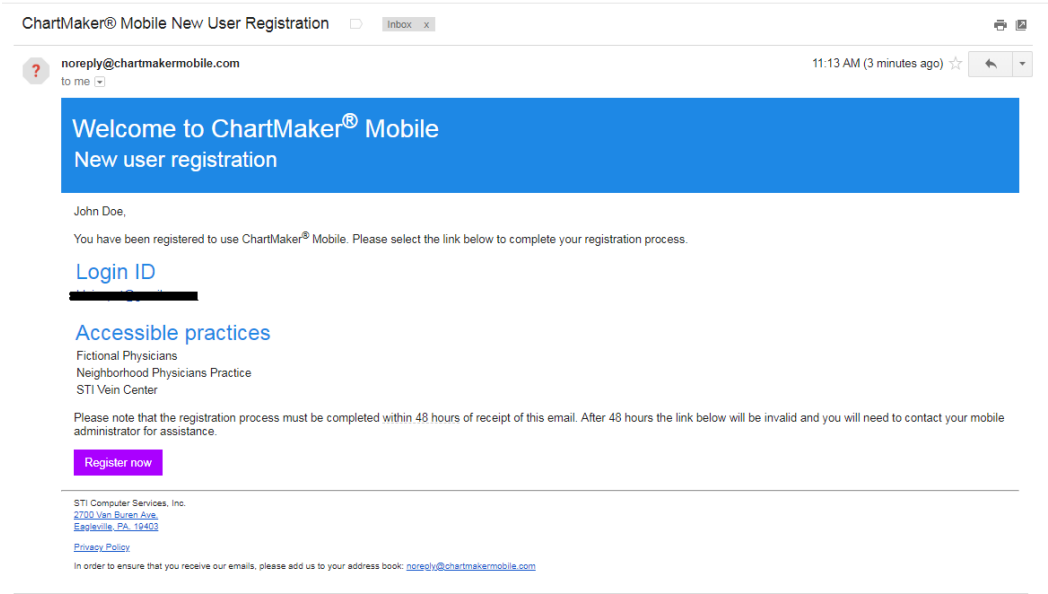
Using the ChartMaker® Mobile

Register for ChartMaker® Mobile

Prior to using the ChartMaker® Mobile, the user must complete the registration process for ChartMaker® Mobile, which involves creating a password, agreeing to the Terms of Service, and downloading the app from the App Store (for iPhone users) or Google Play (for Android users). It is recommended, though not necessary, that you perform this registration process using the mobile device on which you are going to be using ChartMaker® Mobile.

The following steps will walk you through completing the ChartMaker® Mobile registration process.

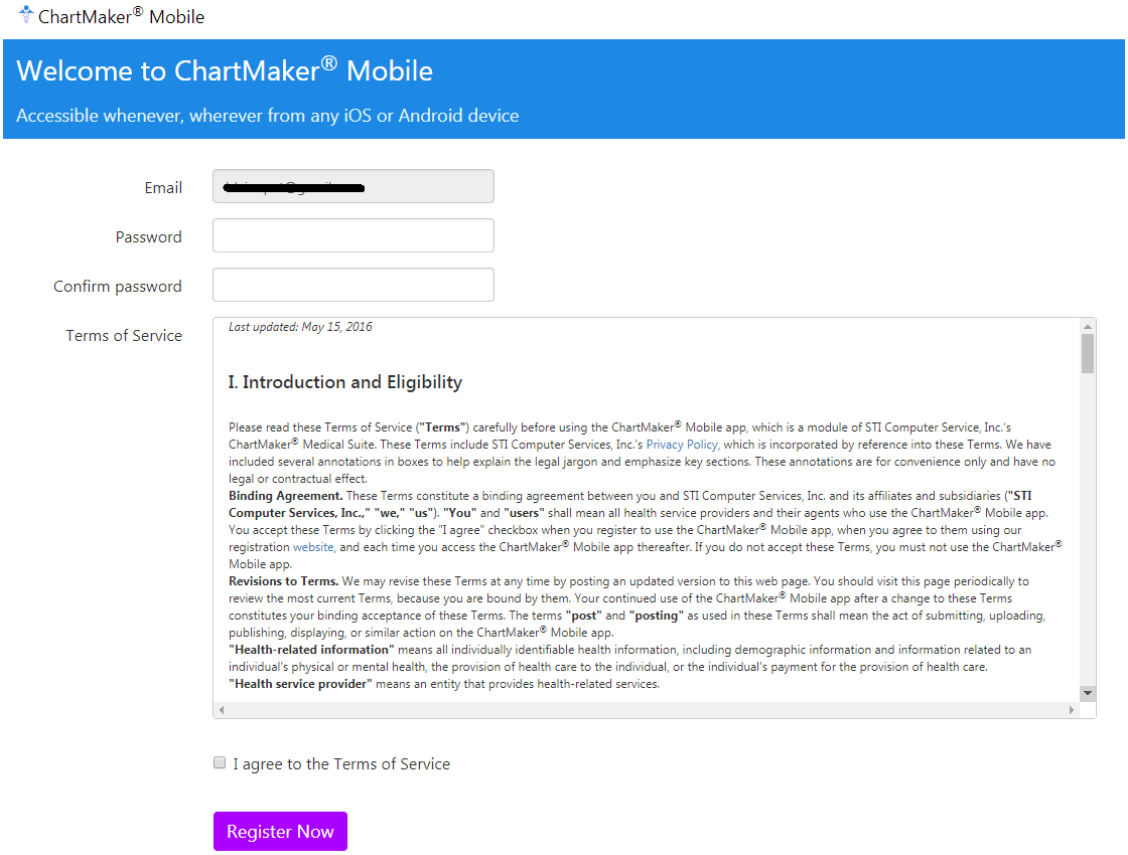
1. After a Mobile Administrator initiates the registration process for you via the Mobile Administration dialog, you will receive a **ChartMaker® Mobile New User Registration** email that contains your **Login ID** (your email address), the **Accessible Practices**, and prompt you to complete the registration process. To do this, click or press the **Register now** button.



2. After the Register now button has been clicked, your web browser will open to the Welcome to ChartMaker Mobile page. Here you can create your **Password**, and then confirm that password in the **Confirm Password** field.

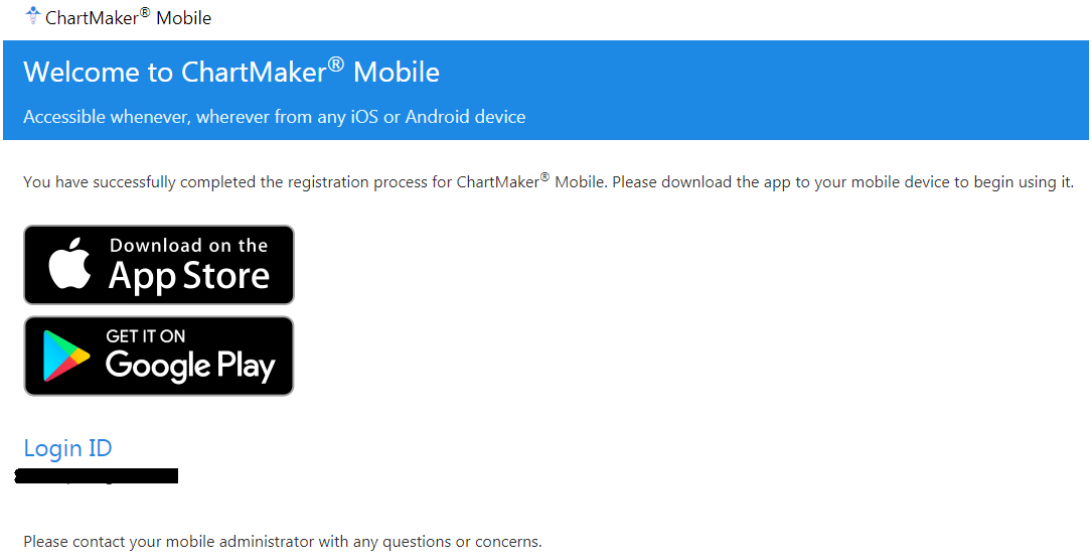
   *****NOTE*****
   When creating a new password, the password must be between 8 and 14 characters long, contain at least **1 lowercase letter**, **1 uppercase letter**, **1 number**, and **1 special character** (!@#$%^&*?).

3. Next, you can review the Terms of Service agreement, check the **I agree to the Terms of Service** option, and then click or press the **Register Now** button.



4. You will then be taken to another web page where you will be notified that the registration process is complete and prompted to download the app to your mobile device to begin using it. Click or press the **App Store** or **Google Play** button. Once ChartMaker Mobile has been downloaded and installed you can start using the app.

*****NOTE*****
If you are not on a mobile device, or do not want to download the app now, you can close out of this page. You can then access the app in the App Store or Google Play at any time via your mobile device. When connected, simply search for ChartMaker Mobile, then download and install the app.



Log into ChartMaker® Mobile

After ChartMaker® Mobile has been installed on your mobile device, you can log into the app. Use following steps to log into the ChartMaker® Mobile.

1. Locate and tap the **ChartMaker** icon on your device.

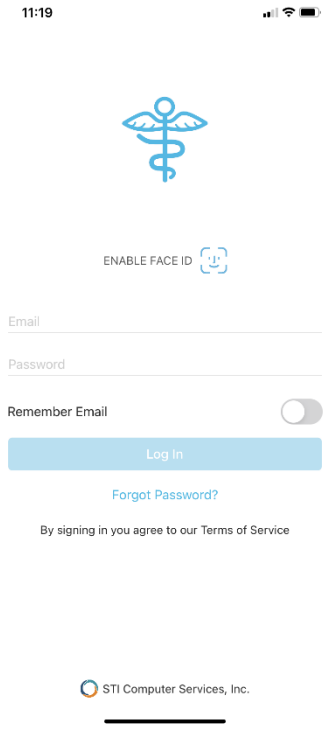
2. In the Login screen, enter your **Email** and **Password** in the corresponding fields; or you can enable Face ID (facial recognition) for iOS (Apple) devices, or enable Fingerprint recognition for Android devices, to log in to the app (go to step 4 to enable Face ID, or step 7).

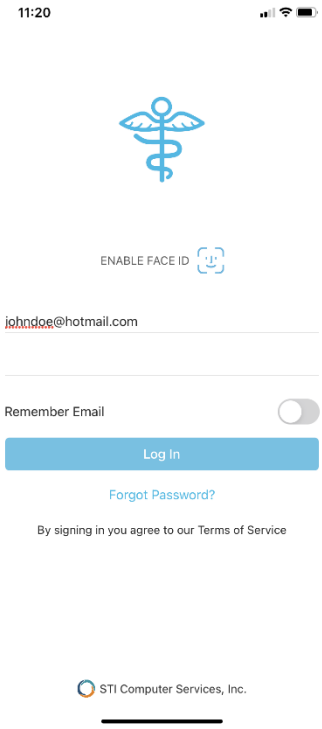
   *****NOTE*****
   You have the ability for the app to remember your email, to save time when logging in, by activating the **Remember Email** option.

3. After your email and password have been entered, tap the **Log In** button.

   *****NOTE*****
   If you cannot remember your password, tap the **Forgot password?** link, where you can enter your email address and a reset password link will be sent to your email address.

   *****NOTE*****
   If your account becomes locked due to 5 unsuccessful login attempts, you can either wait for the duration of the lockout, and then attempt to login again; or you can contact your Mobile Administrator to have them unlock your account. See pages 9 for information about manually unlocking a user's account.



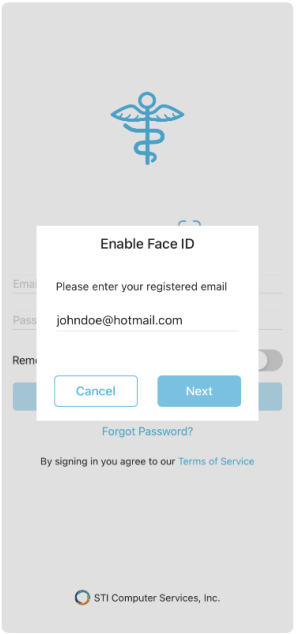


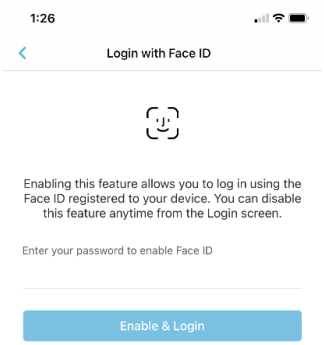
4. To enable facial recognition, tap **Enable Face ID** above the Email and Password fields.

   *****NOTE*****
   Facial recognition via Face ID is currently only available and supported on iOS (Apple) devices.

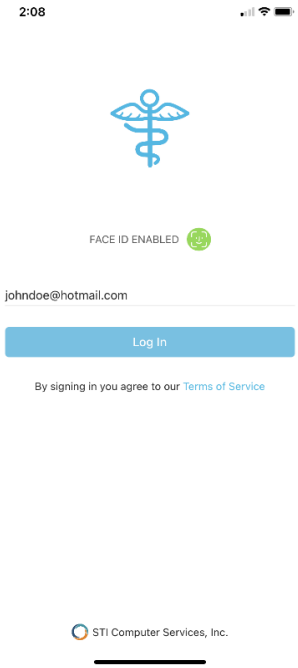
5. If you have not entered the email on the initial login screen, a pop-up will appear prompting you to enter your registered email. Enter your **Email**, and then tap **Next**.

6. Next, enter your Password in the corresponding field, and then tap **Enable & Login**.





*****NOTE*****
When logging in when the facial recognition is active, the login screen will have Face ID Enabled and the icon to the right will be green. If your email is entered, simply need to tap **Log In**.



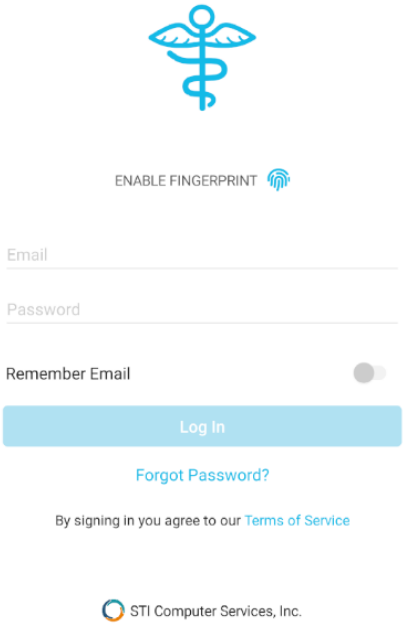
7. To enable fingerprint recognition, tap **Enable Fingerprint** above the Email and Password fields.

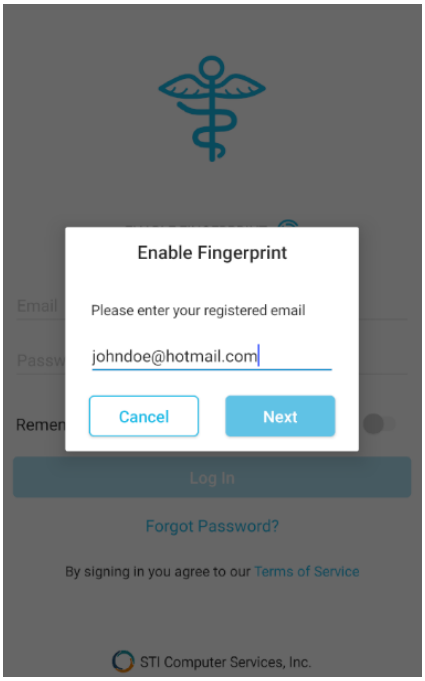
   *****NOTE*****
   Fingerprint recognition is currently only available and supported on Android devices.

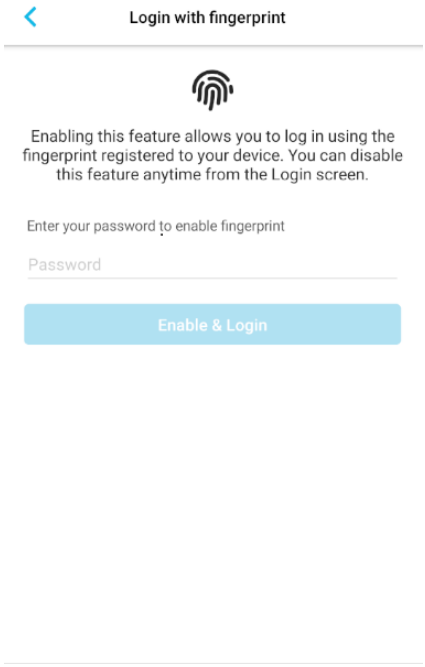
8. If you have not entered the email on the initial login screen, a pop-up will appear prompting you to enter your registered email. Enter your **Email**, and then tap **Next**.

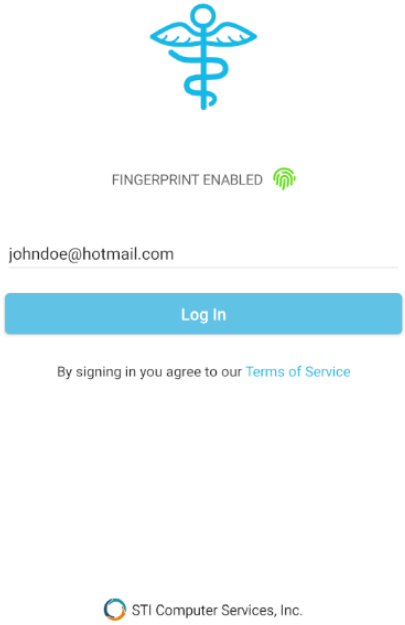
9. Next, enter your Password in the corresponding field, and then tap **Enable & Login**.

   *****NOTE*****
   When logging in when the facial recognition is active, the login screen will have Face ID Enabled and the icon to the right will be green. If your email is entered, simply need to tap **Log In**.

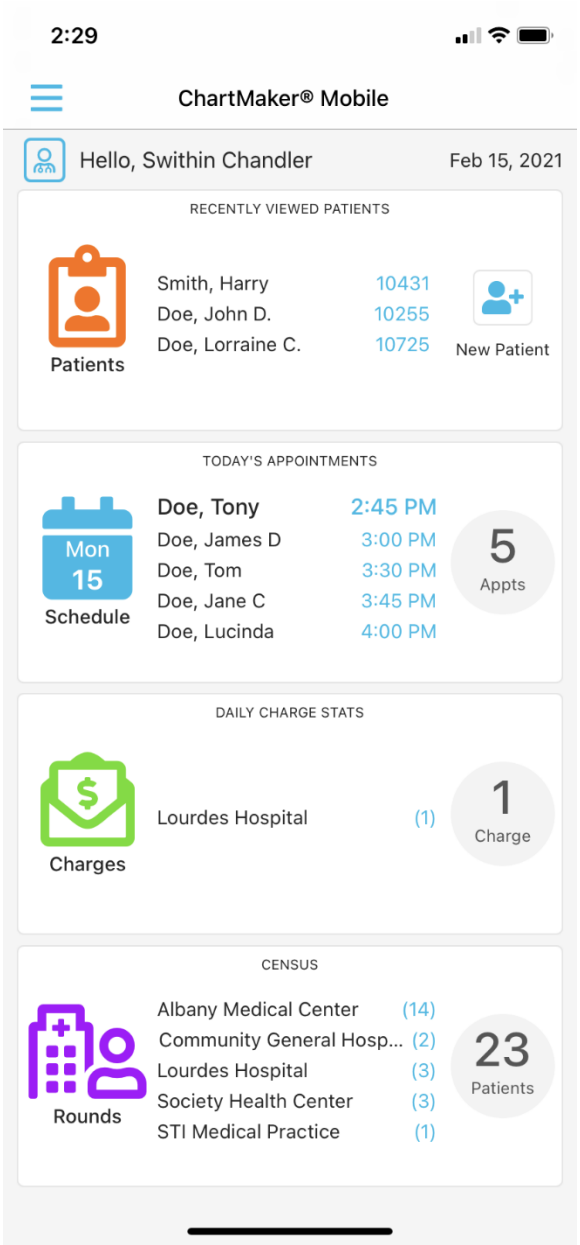








10. Once you have successfully logged onto ChartMaker® Mobile, the home screen will appear. You can now view and use all the features throughout ChartMaker® Mobile such as viewing appointment Schedules, patient demographic and clinical data, add Charges for patients, view Hospital rounds patient lists for facilities, as well as changing your password, set a default schedule, set a default practice, and create procedure lists for your practices. Likewise, the home page will include a summary of any recently viewed patients, today's appointments, daily charge stats, and census for hospital Rounds.



Configure Settings

The Settings menu allows you access to the areas where you can change your password, set the provider for whom you would like to default when viewing the appointment schedules, configure user preferences, and manage practice-level procedure lists. The following sections will walk you through how to perform each of these tasks.

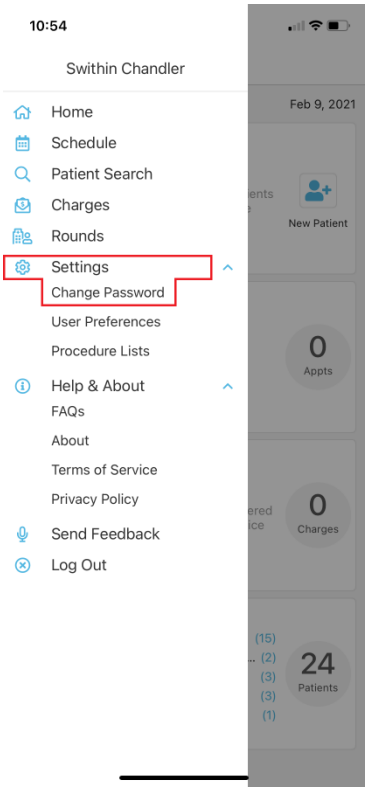
Change Password

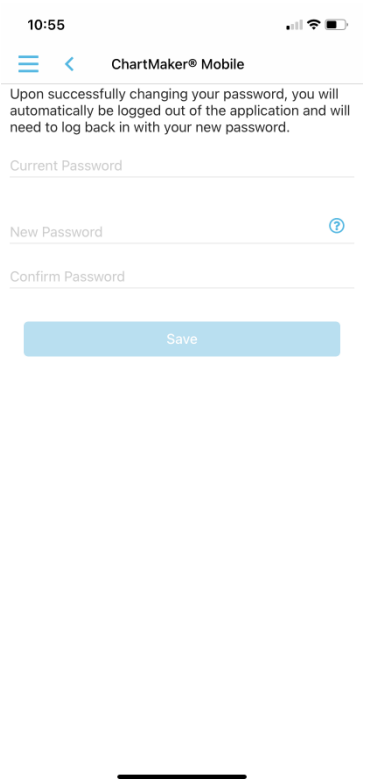
The Change Password screen allows you to easily change your password whenever you need. Use the following steps to change your password.

1. To access the Change Password screen, tap the ☰ icon in the top-left to access the Mobile menu, then tap **Settings**, and then **Change Password**.

2. In the Change Password screen, enter your **Current Password**, then enter your **New Password**, and then confirm your new password in the corresponding field.

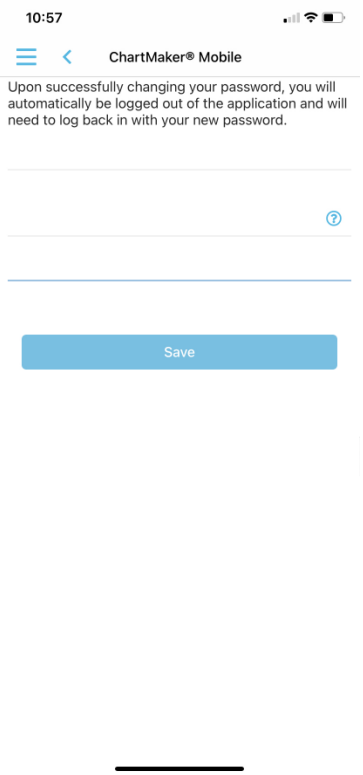
*****NOTE*****
When creating a new password, the password must be between 8 and 14 characters long, contain at least **1 lowercase letter**, **1 uppercase letter**, **1 number**, and **1 special character** (!@#$%^&*?). You can tap the **?** to the right of the New Password field to view the Password Requirements.

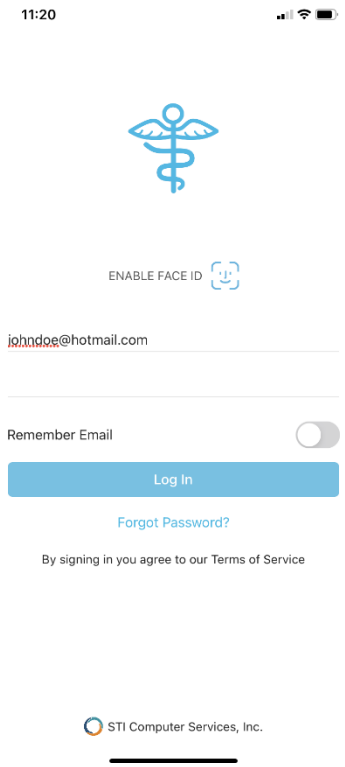




3. After your new password and confirmation have been entered successfully, tap the **Save** button. Your mobile session will expire, and you can then log back into the app using your new credentials.

*****NOTE*****
If you changed your password and had Face ID Enabled, you will have to disable facial authentication, by tapping **Face ID Enabled**, then tapping **Disable**; and then reenable it by tapping **Enable Face ID**, entering your new password, and then tapping **Enable & Login**.

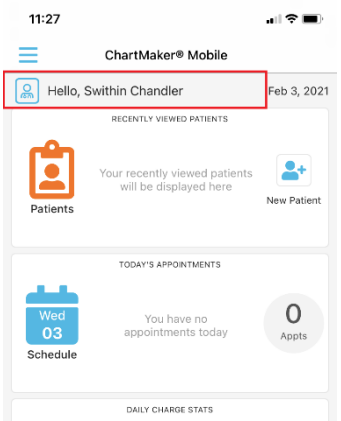


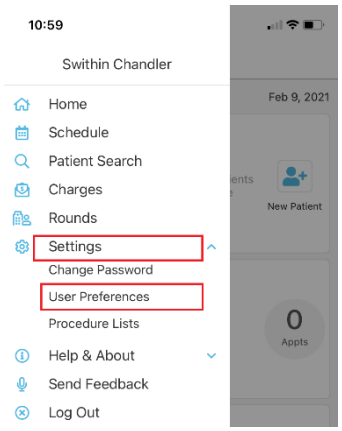


User Preferences

The User Preferences screen allows you to select the practice that you would like to default throughout ChartMaker® Mobile and allows you to select the appointment schedule that you would like to default when accessing the Schedule screen to view appointment schedules. Use the following steps to configure your user preferences.

1. You can access the User Preferences screen by tapping the (and anywhere in the username to the right), or by tapping the icon in the top-left to access the Mobile menu, then tap **Settings**, and then **User Preferences**.

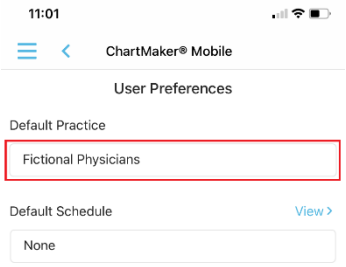


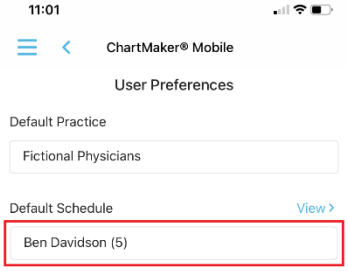


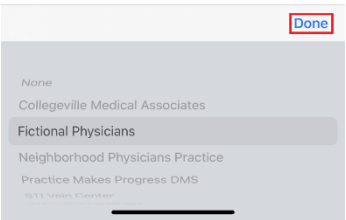
2. In the User Preferences screen, tap into the **Default Practice** field, then select the desired **Practice**, and then tap **Done**.

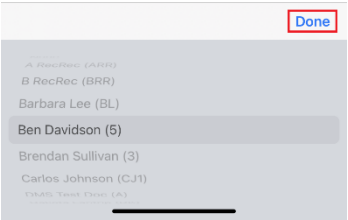
3. Next, tap into the **Default Schedule** field, then select the desired **Provider**, and then tap **Done**.

4. When finished, you can then tap **View >** to access the selected provider's schedule, tap **<** to go back to the previous screen, or tap the icon in the top-left to access the Mobile menu.







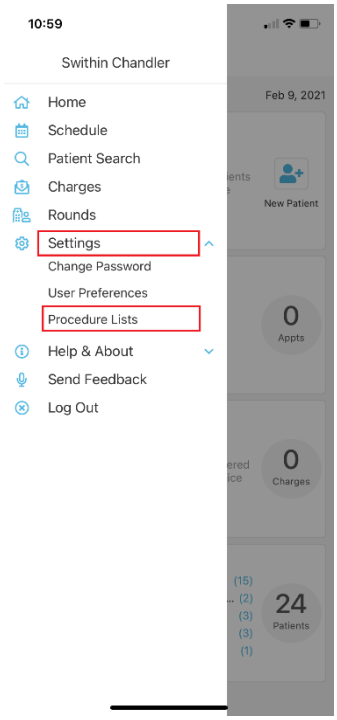


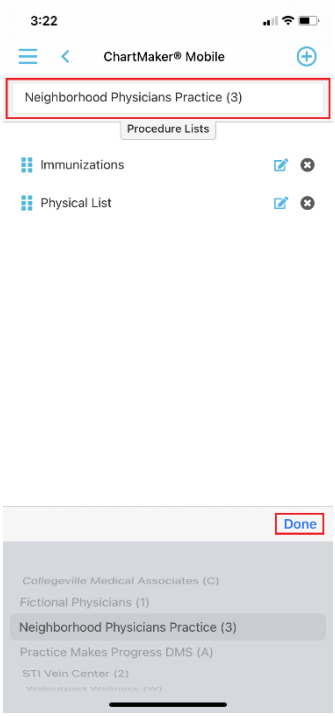
Procedure Lists

The Procedure Lists screen allows you to create and maintain practice-level procedure lists to provide an easy way to select a procedure when capturing a charge in ChartMaker® Mobile. These practice-level procedure lists will then be accessible by any user that has access to the applicable practice for which they were created. You can create a single list, or multiple lists, per your office's needs. Use the following steps to create and maintain practice-level procedure lists.

1. To access the Procedure Lists screen, tap the ☰ icon in the top-left to access the Mobile menu, then tap **Settings**, and then **Procedure Lists**.

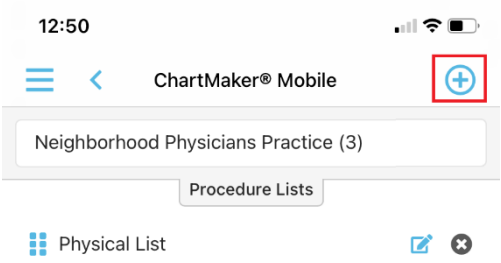
2. Once the Procedure Lists area is accessed, you can view the procedure lists for the various practices in your system by tapping in the **Practice** field, then select the desired **Practice**, and then tap **Done**.

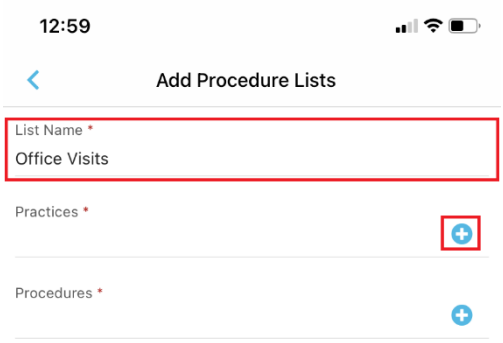




3. To **Add a New Procedure List**, tap the ⊕ icon in the upper-right, above the Practice field. (To edit a procedure list, go to step 11. To delete a procedure list, go to step 15.)

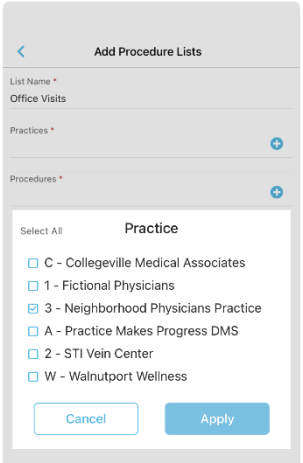
4. In the Add Procedure Lists screen, enter a **List Name** by tapping into the corresponding field, and then tap the corresponding ⊕ button to add the **Practices** for whom this procedure list is being created.

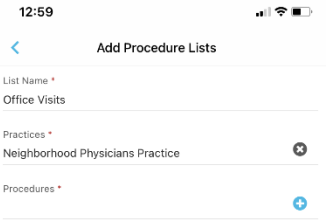




5. In the Practice pop-up screen, tap the applicable **Practices** you want to add for the procedure list so that a checkmark appears in the corresponding box, and then tap the **Apply** button. After the practices have been added for the procedure list you are adding, you can remove any added practices by tapping the corresponding ⊗ button or add additional practices by tapping in the corresponding field which will open the Practice pop-up screen allowing you to modify the selected practices as, needed.

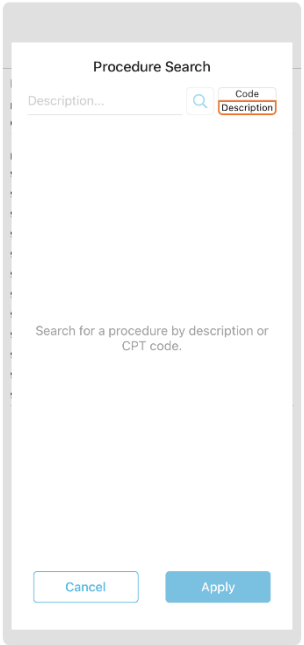
6. Next, tap the corresponding ⊕ button to add the **Procedures** for the procedure list.

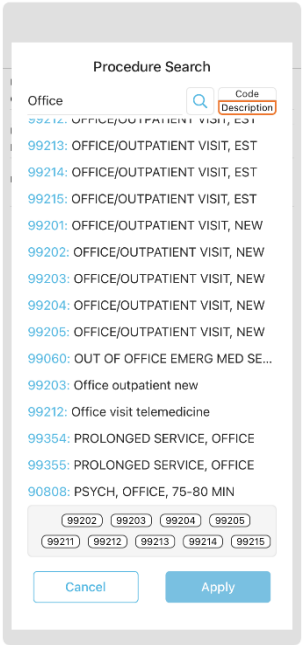




7. In the Procedure Search screen, you can search for procedures by Description or Code. To change the search parameter, tap **Code** or **Description** and an orange border will surround the selected option; then enter the applicable **Search Criteria** in the search field, and then tap the button.

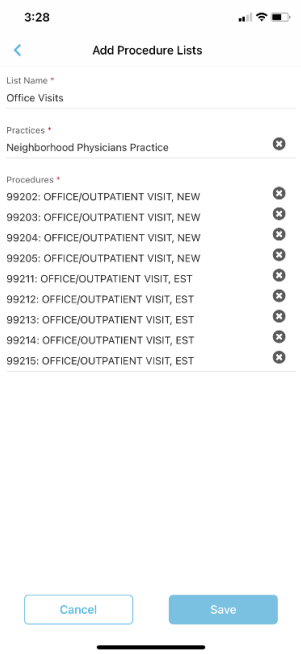
8. The system will display any matches. Tap the **Procedures** that you want to add to the procedure list and the selected procedures will appear at the bottom section of the screen above the Cancel and Apply buttons. You can remove a selected procedure by tapping that applicable procedure in this section at the bottom. Likewise, you can modify the Search Criteria and tap the button, if needed, to select other procedures not displayed. After all the applicable procedures have been selected, tap the **Apply** button.

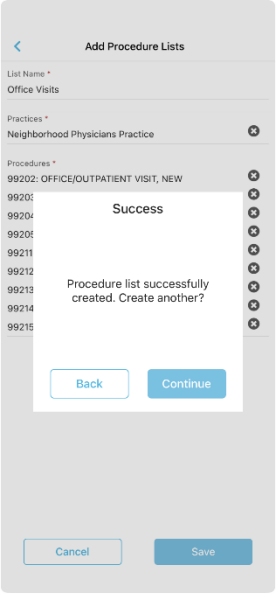




9. After the procedures have been added for the procedure list you are adding, you can remove any added procedures by tapping the corresponding ⊗ button, or you can add additional procedures by tapping in the corresponding field which will open the Provider Search screen allowing you to add additional procedures, as needed.

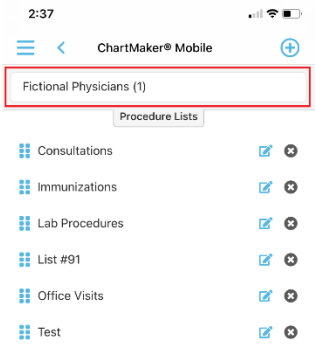
10. After the List Name, Practices, and Procedures have been configured for the procedure list as desired, tap the **Save** button. A Success dialog will then appear, tap **Continue** if you want to make another procedure list, or tap **Back** if you are finished making procedure lists.

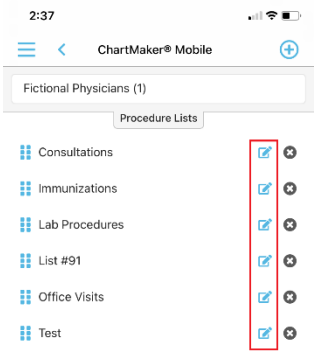


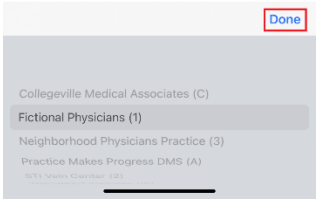


11. To **Edit a Procedure List**, select the Practice you want to modify a procedure list, and then tap **Done**.

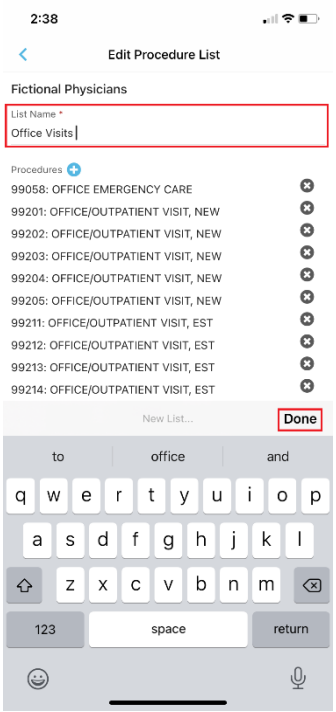
12. In the Procedure Lists for the Practice selected, tap the corresponding button next to the procedure list you want to edit.

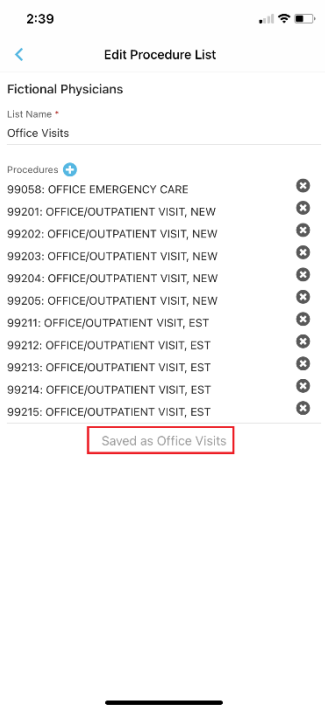




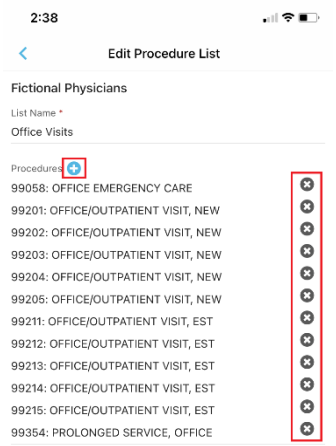


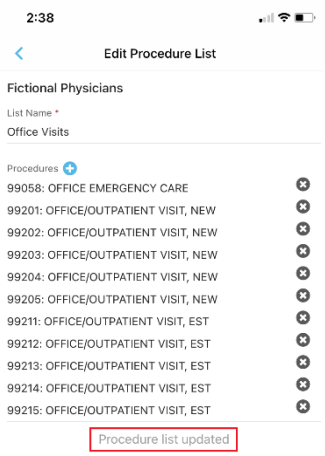
13. In the Edit Procedure List screen, you can modify the List Name and the Procedures in the selected procedure list. To modify the List Name, tap into the corresponding field, and then using the keyboard activated in the bottom of the screen make the necessary modifications to the name, then tap **Done**. The system will then save the name change and will display a saved notification below the procedure list.





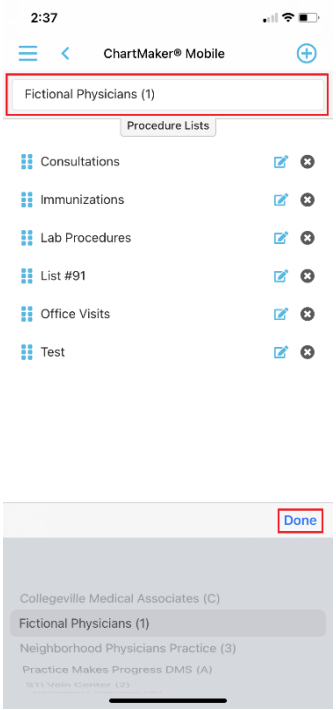
14. You can then add or delete procedures for the selected procedure list. To **add** a procedure, tap the corresponding ⊕ button next to the Procedures section title. This will take you to the Procedure Search screen where you can add procedures in a similar manner as outlined in steps 7 and 8 above. To **delete** a procedure from the list, tap the corresponding ⊗ button. After procedures have been added or deleted, the changes will be saved, and a **Procedure list updated** notification will be displayed below the procedure list.

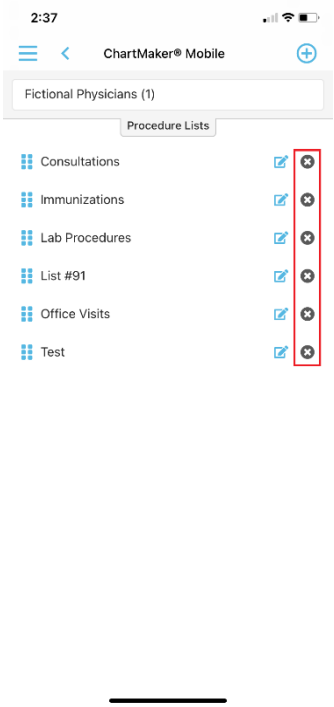




15. To **Delete a Procedure List**, select the Practice you want to delete a procedure list for, and then tap **Done**.

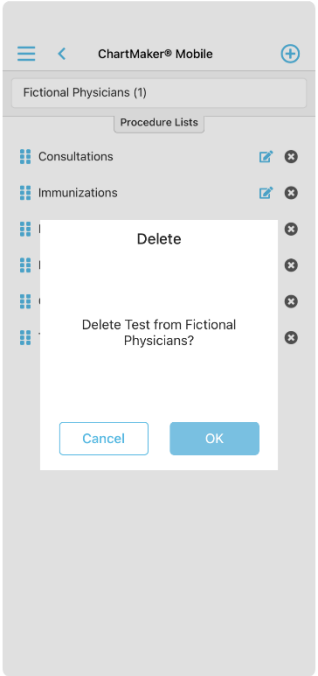
16. In the Procedure Lists for the Practice selected, tap the corresponding ⊗ button next to the procedure list you want to delete.

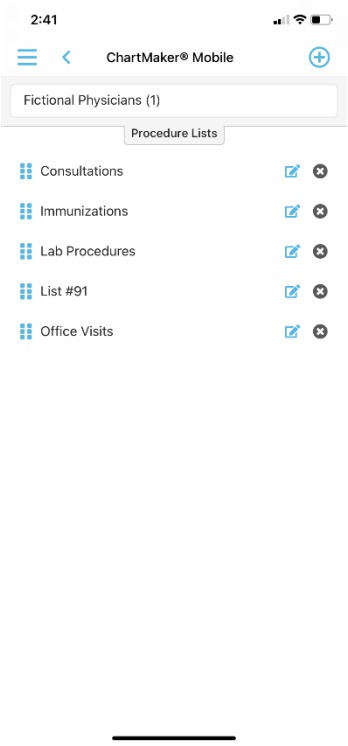




17. A Delete pop-up dialog will appear confirming the deletion, tap the **OK** button.

18. You will return to the Procedure Lists for the selected practice. You can then add, edit, or delete additional procedure lists as needed.



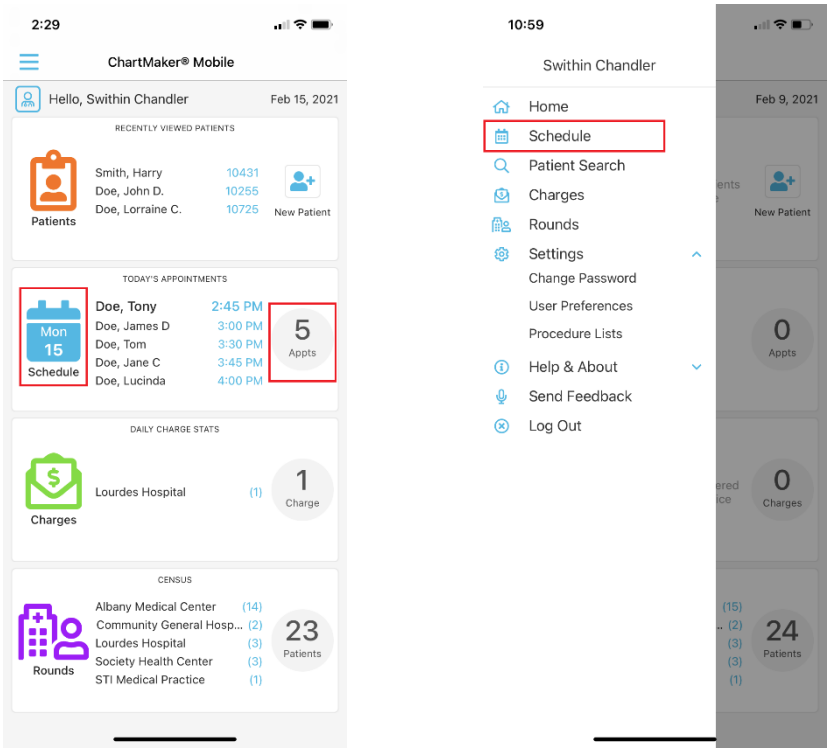


View Appointment Schedules

The Schedule screen allows you to view the various appointment schedules throughout your system and the list of patient appointments for those schedules. When viewing appointment schedules, the system will default to the provider's schedule set up in User Preferences screen. If no provider was set up in the User Preferences screen, the system will display the first provider's schedule alphabetically by first name. You can change provider schedules when viewing appointments. Use the following steps to view appointment schedules.

1. To access the Schedule screen, tap the **Schedule** option on the Home page, or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Schedule**.

   *****NOTE*****
   If you tap a patient in the Today's Appointment list in the Home screen, the Appointment Details screen for the patient will open, allowing you to easily access detailed information about the patient's appointment from the Home screen.

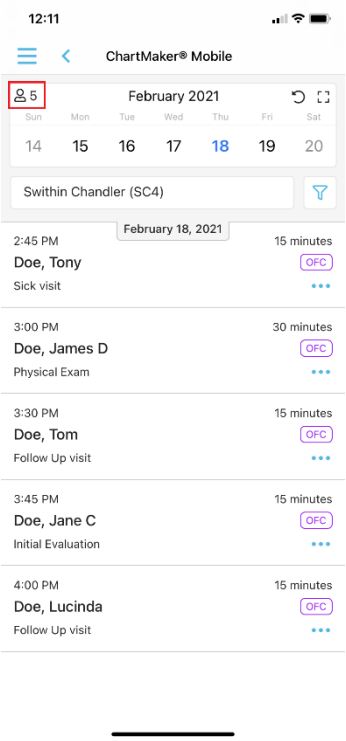


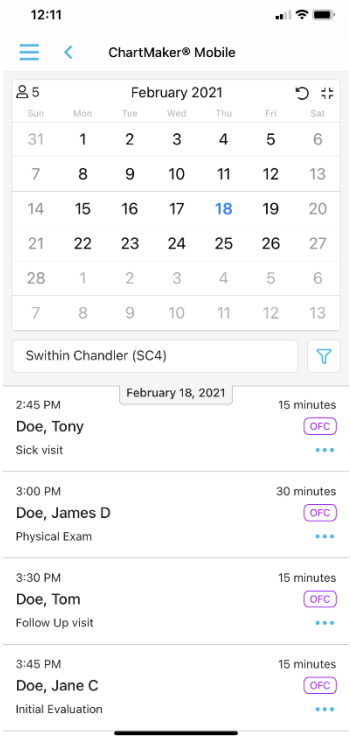
2. When initially accessing the Schedule screen, the appointment list for the provider's schedule you set up as a default will be displayed for today's date. If no default was selected, the provider associated with the user will be displayed for today's date.

   When viewing schedules, the number of appointments that are in the current appointment list for the days selected will be displayed in the upper left of the calendar. The calendar will default to the current week, with today's date highlighted.

   You can tap **a specific day** in the calendar to view the appointment schedules for that day. Or, you can swipe right to left on the calendar to advance a week, or swipe left to right to move the schedule back a week.

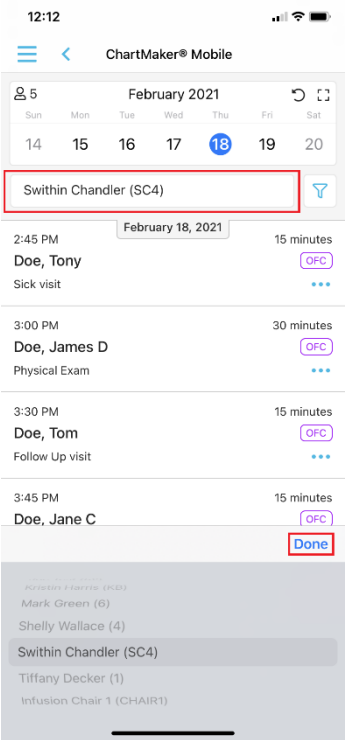
   If you tap the ⛶ icon in the upper right of the calendar, the calendar will open to a monthly view. You can then select the day you want to view appointment schedule for, or swipe left and right to advance a month or go back a month. Tap, the ⛶ icon in the upper right of the calendar to return to the weekly view or tap the ↺ icon to return to today's date.

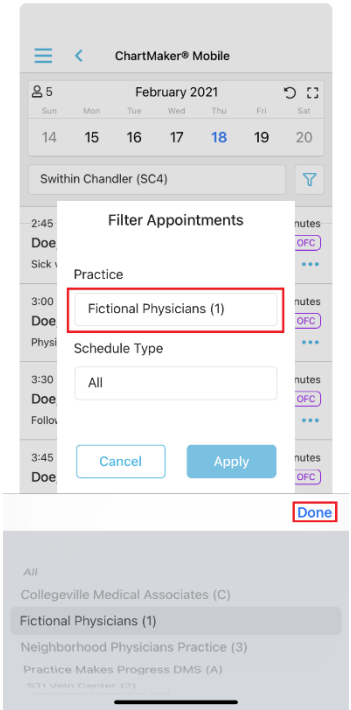




3. You can change the provider's schedule by tapping the **Provider**, then select the desired Provider's schedule you want to view, and then tap **Done**.

4. You can tap the button to access the Filter Appointments screen where you can configure the filter by **Practice** and/or **Schedule Type** to determine how the appointments will be categorized when viewing appointments, by tapping into the corresponding field, selecting the **Practice** or **Schedule Type**, and then tapping **Done**. When finished, tap the **Apply** button.





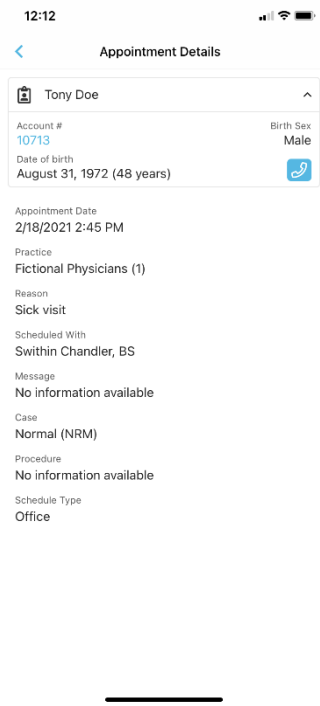
5. When viewing schedules, you can tap a **Patient Appointment** to access the Appointment Details for that appointment.

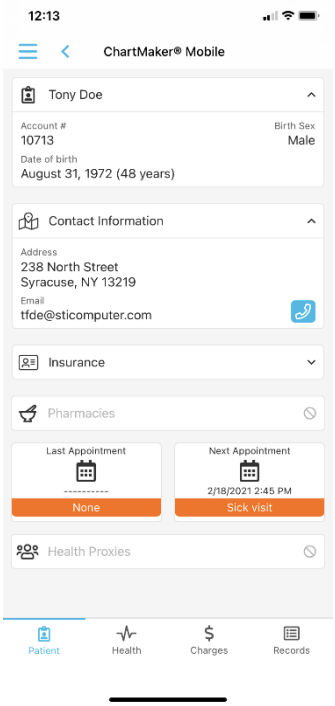
6. The Appointment Details screen is broken into two sections: Patient Demographic Summary and Appointment Details. The Patient Summary section will display the patient's **Account #**, **Date of birth**, **Birth Sex**, and button. You can tap the **Patient's Name** to hide this information. The Appointment Details section will display the Appointment Date, Practice, Reason, Scheduled With, Message, Case, Procedure, and Schedule Type.

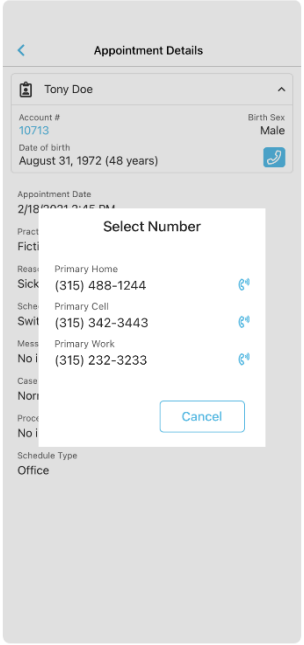
   Tap the **Account #** to access the Patient screen where you view the patient's demographic and chart information. When finished, tap the **<** button to return to the Appointment Details.

   Tap the button to call the patient. A Select Number pop-up will then open allowing you to select the phone number you want to call. Tap the desired **Phone Number** to initiate the call. When finished with the call you will return to the Appointment Details screen.

7. When finished viewing the appointment details tap **<** next to Appointment Details to return to the schedule you were viewing.







View & Add Patient Information

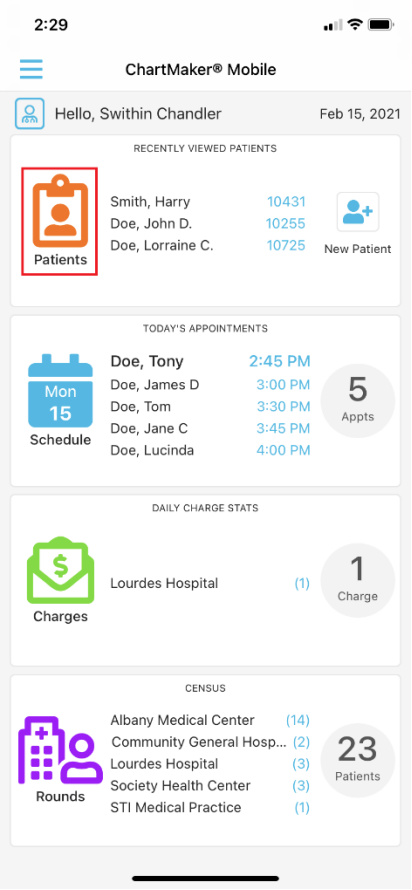
When initially accessing the Patient option in ChartMaker® Mobile, a Patient Search screen will appear allowing you to search for an existing patient that you would like to access and view patient information for, or you also have the option to add a new patient if the patient you are searching for does not currently exist in your system. You can also add a new patient directly from the Home screen via the New Patient button. The following sections will walk you through searching for an existing patient and viewing their patient details, as well as adding a new patient through ChartMaker® Mobile.

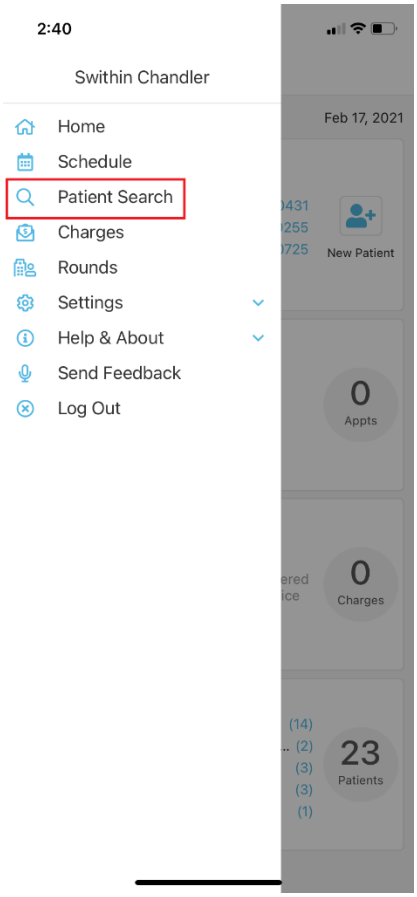
View Patient Information

The Patient area of ChartMaker® Mobile allows access to the Patient, Health information, mobile Charges, and Records screens for the selected patient. In the Patient screen you can view patient demographic, contact, insurance, pharmacies, appointment, and health proxy information. In the Health screen you can view the patient's advance directives, allergies, medications, and diagnoses. In the Charges scree, you can view any previously sent mobile charges for the patient, as well as add a new charge, or copy a previous charge. In the Records screen, you can view, in read-only text format, charge notes and lab results for the patient. Use the following steps to access the patient area and view this information for a patient.

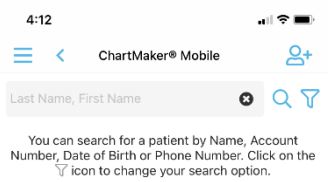
1. To access the Patient area, tap the **Patient** option in the Home page, or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Patient Search**.

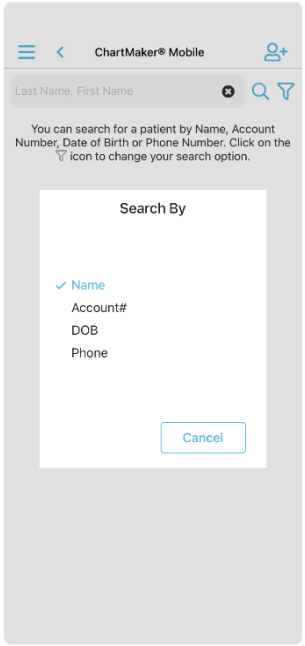
   *****NOTE*****
   If you tap a patient's account number in the Recently Viewed Patients section in the Home screen, the Patient screen for that patient will open. Likewise, you can add a new patient directly from the Home screen by tapping the button.





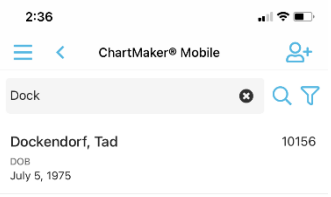
2. In the Patient Search screen you can search for the patient for whom you want to view information. You can tap the button to access the **Search by** screen where you can configure to search by **Name**, **Account #**, **DOB**, or **Phone**. Tap the desired choice or tap the **Cancel** button.

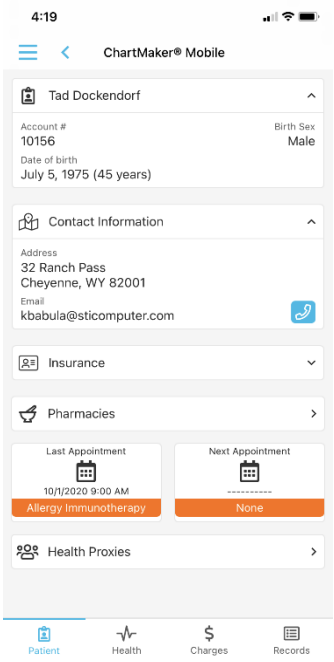




3. In the Search field, enter relevant **Search Criteria**, then tap the icon to the right, and the system will return any matches.

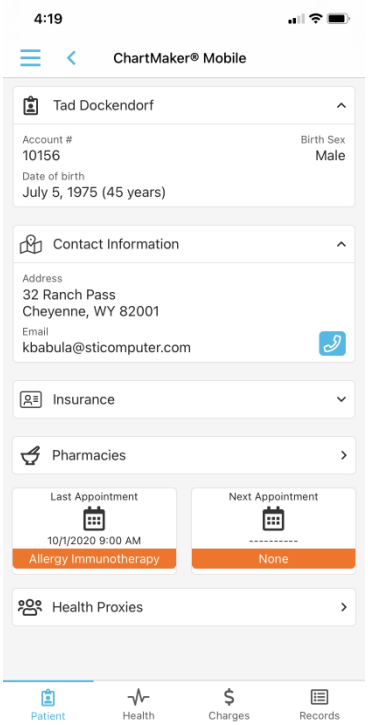
4. Once the patient for whom you want to capture charge information is located, tap that **Patient**, and the **Patient** screen will appear for the selected patient.

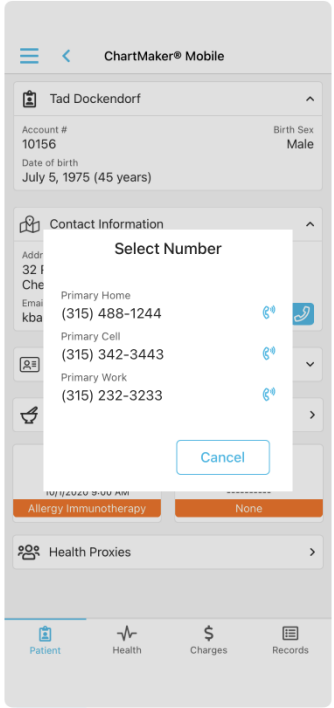




5. The **Patient** screen allows access to the patient's contact information, insurance, pharmacies, appointments, and health care proxies that were configured for the patient. If information is available for an option, the font will be black for that option; while if no information is available for an option, the font will be gray and an ⊘ icon will appear at the end of the field.

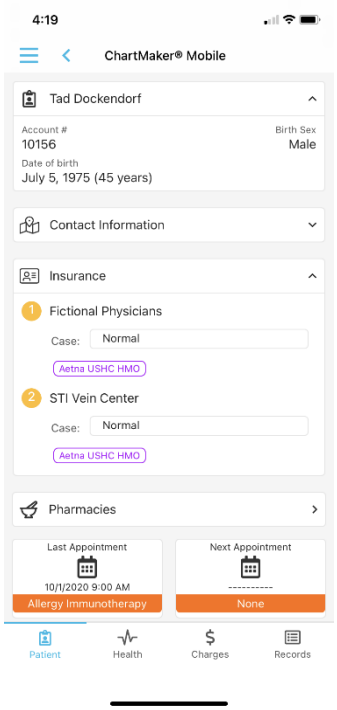
6. To view contact information for the patient, tap **Contact Information**. The contact information will be displayed. Tap the button to call the patient. A Select Number pop-up will then open allowing you to select the phone number you want to call. Tap the desired **Phone Number** to initiate the call. When finished with the call you will return to the Patient screen. You can tap **Contact Information** again to hide the patient's contact information.

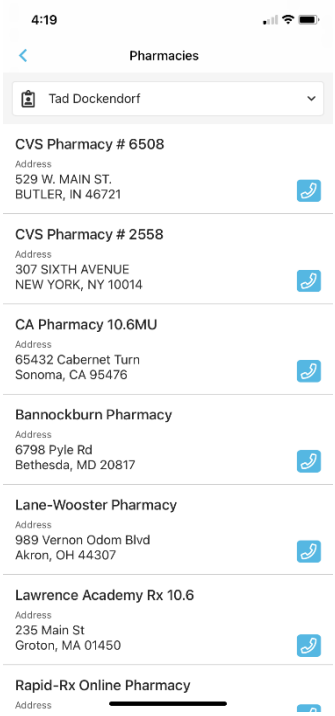




7. To view insurance information for the patient, tap **Insurance**. The insurance information will be displayed. You can tap **Insurance** again to hide the patient's insurance information.

8. To view pharmacy information for the patient, tap **Pharmacies**. The pharmacy information will be displayed. You can tap the corresponding button to initiate a call to the pharmacy if you need to contact them. You can tap **Pharmacies** again to hide the patient's pharmacy information.

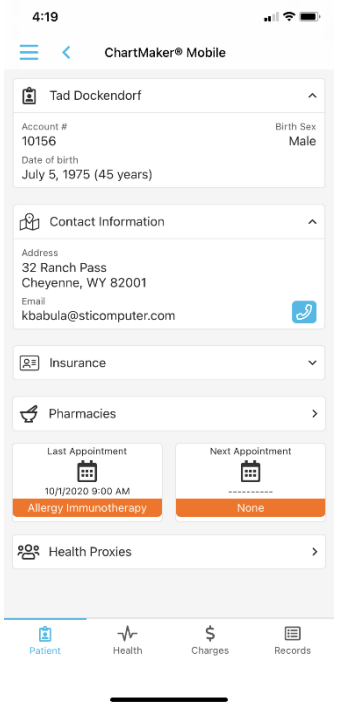


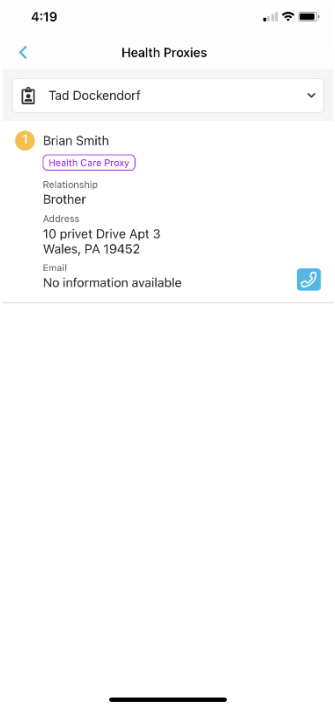


9. The **Patient** screen will display the **Last Appointment** and **Next Appointment** for the patient. You can tap either of these to access and view the Appointment Details for that appointment, if needed.

10. To view health care proxy information for the patient, tap **Health Care Proxies**. The health care proxies for the patient will be displayed. You can tap the corresponding button to initiate a call to the proxy if you need to contact them. You can tap **<** icon in the top left to return to the Patient screen.

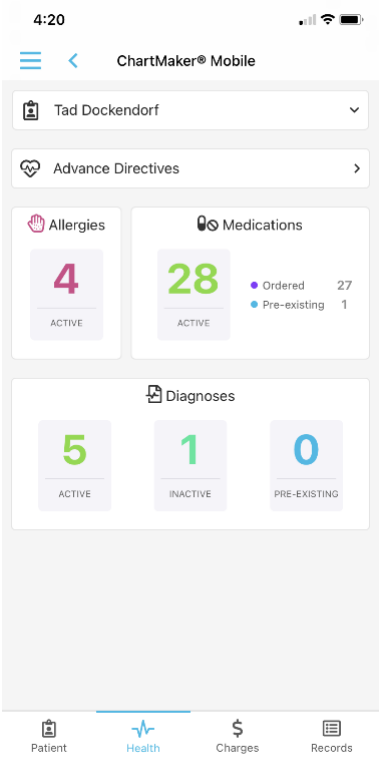
11. When finished viewing information on this page, tap the Health icon to access the Health screen, or tap the Charges icon to access the mobile Charges screen, or tap the Records icon to access the Records screen for the patient, or tap **<** icon in the top left to go back to the Patient Search screen.

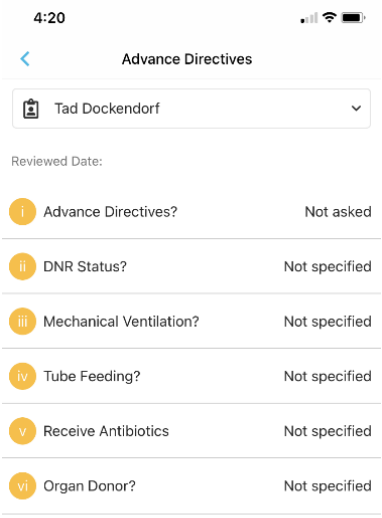




12. The **Health** screen allows access to the patient's advance directives, allergies, medications, and diagnoses. If information is available for an option, the font will be black for that option; while if no information is available for an option, the font will be gray and will be indicated as No information available. Likewise, the number of active Allergies and Medications, as well as active, inactive, and preexisting Diagnoses will be easily viewable for the patient.

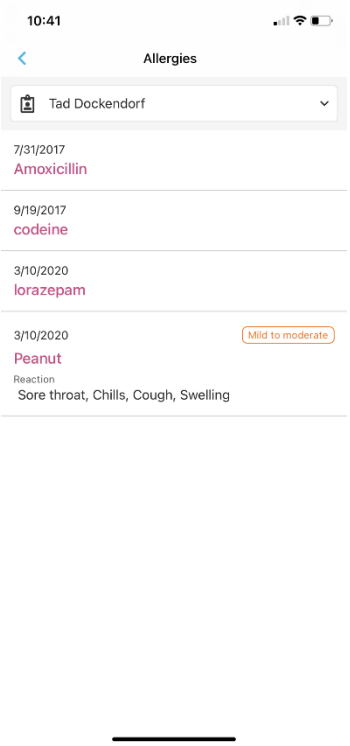
13. To view advance directives for the patient, tap **Advance Directives**. The advance directives will be displayed. You can tap the **<** icon in the top left to return to the Health screen.

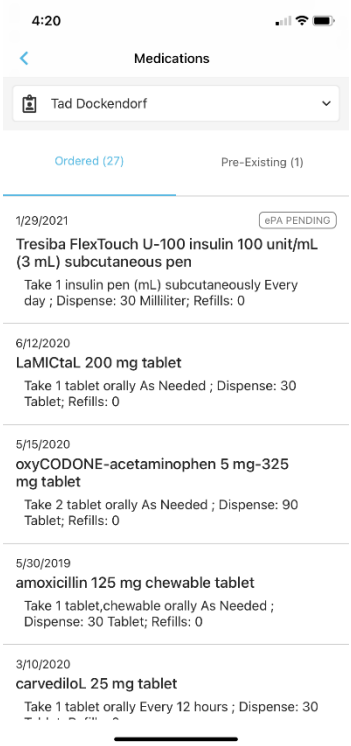




14. To view allergies for the patient, tap **Allergies**. The Allergies screen will list the various allergies and their added date for the patient. Any **Reaction**, **Severity**, and **Date Reviewed** for that allergy will be also be displayed, if configured. You can tap the **<** icon in the top left to return to the Health screen.

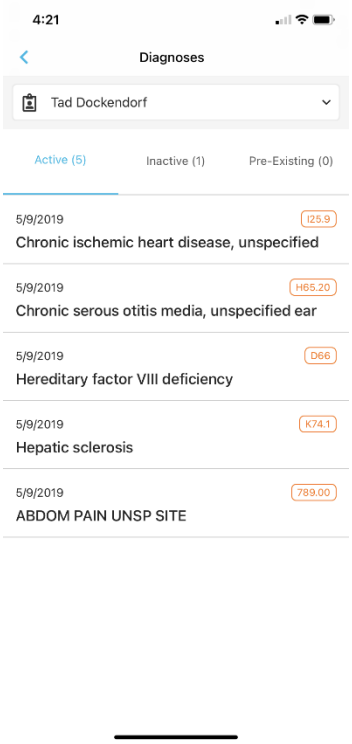
15. To view medications for the patient, tap **Medications**. The Medications screen will default with the **Ordered** medications listed. You can tap the **Pre-Existing** option to display any preexisting medications for the patient. Within each list, the medication **Sig** and **Last Prescribed Date** for that medication will be listed. You can tap the **<** icon in the top left to return to the Health screen.

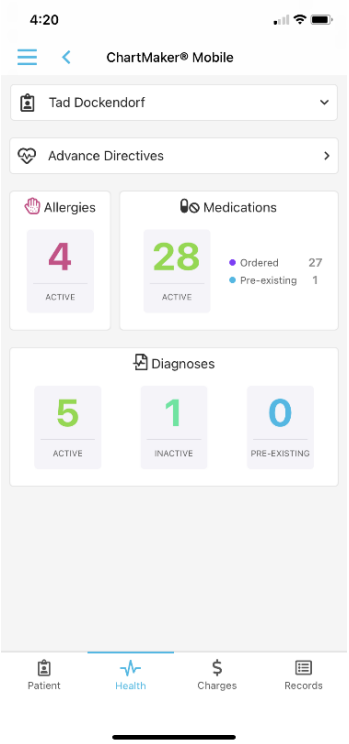




16. To view diagnoses for the patient, tap **Diagnoses**. The Diagnoses screen will default with the **Active** diagnoses listed. You can tap the **Inactive** option to display any inactive diagnoses, or you can tap the **Pre-Existing** option to display any preexisting diagnoses for the patient. Within each list the **Diagnosis**, **Code,** and onset **Date** for that diagnosis will be displayed. You can tap the **<** icon in the top left to return to the Health screen.

17. When finished viewing information in the Health screen, tap the Patient icon to access the Patient screen, or tap the Charges icon to access the mobile Charges screen, or tap the Records icon to access the Records screen for the patient, or tap **<** icon in the top left to go back to the Patient Search screen.



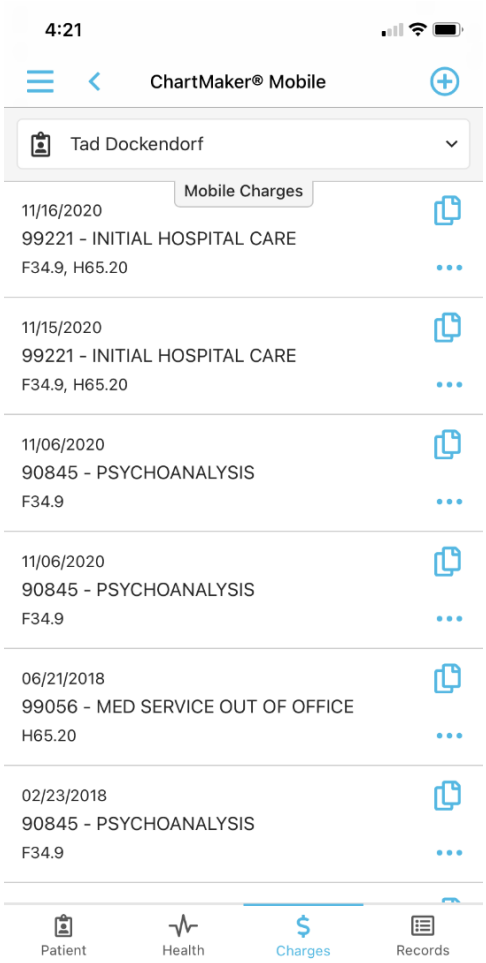


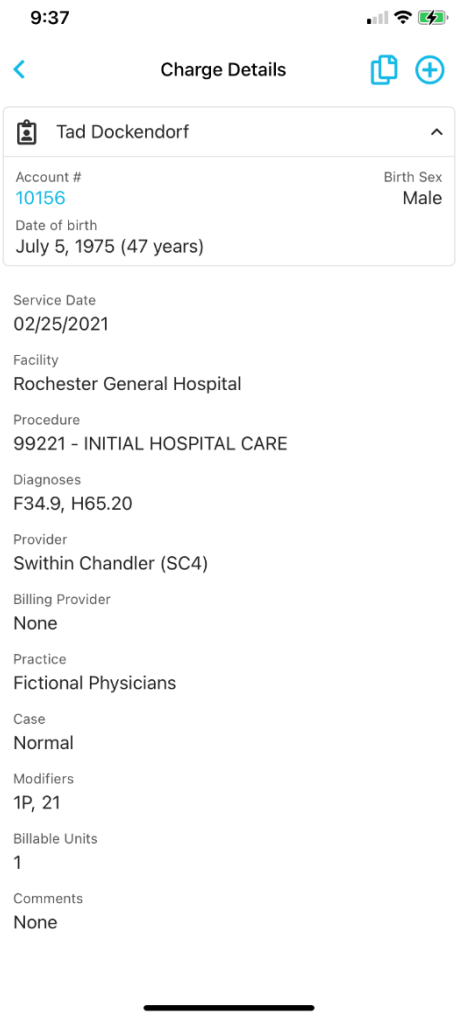
18. The **Mobile Charges** screen will contain any previously sent charges from ChartMaker® Mobile for the patient. In this screen, you can tap the ⊕ icon in the upper-right in the title bar to add a new charge for the patient.

    In the Mobile Charges section, you can access the Charges Details screen for a charge by tapping the applicable charge or by tapping the corresponding ••• icon; or you can copy a previously sent charge by tapping the icon next to the corresponding charge.

    If you accessed the Charges Details screen, the charge details for the selected charge will be displayed. You can copy this charge by tapping the icon in the upper-right in the title bar or can add a new charge for this patient by tapping the ⊕ icon in the upper-right in the title bar. For more information about adding and copying charges see the Charges section below. When finished viewing the Charge Details, tap the **<** to return to the Mobile Charges screen.

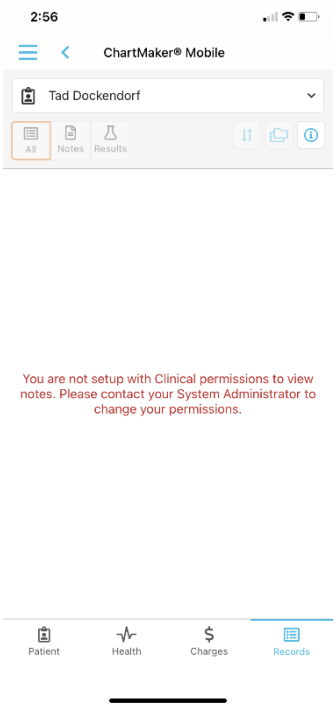
19. When finished viewing information in this page, tap the Patient icon to access the Patient screen, or the Health icon to access the Health screen, or tap the Records icon to access the Records screen for the patient, or tap the **<** icon in the top left to go back to the Patient Search screen.

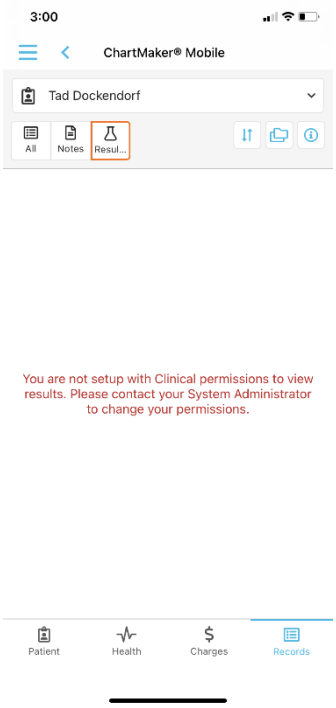




20. The **Records** screen allows you to view, in read-only text format, chart notes and lab results for the patient.

    Upon entering the Records screen, if you do not have a **Charts** privilege of **Read**, **Write**, **Sign w/ Co-Sign**, or **Sign**, configured in the Clinical application, you will not be able to view chart notes or lab results in ChartMaker Mobile and a warning message will appear, and all options will be grayed out. Likewise, if you do not have a **Lab Review** privilege of **All**, any lab reports and/or results will not be accessible in the Records page, and when accessing the Results filtering option, a similar message will appear as when you do not have the proper Charts privilege.





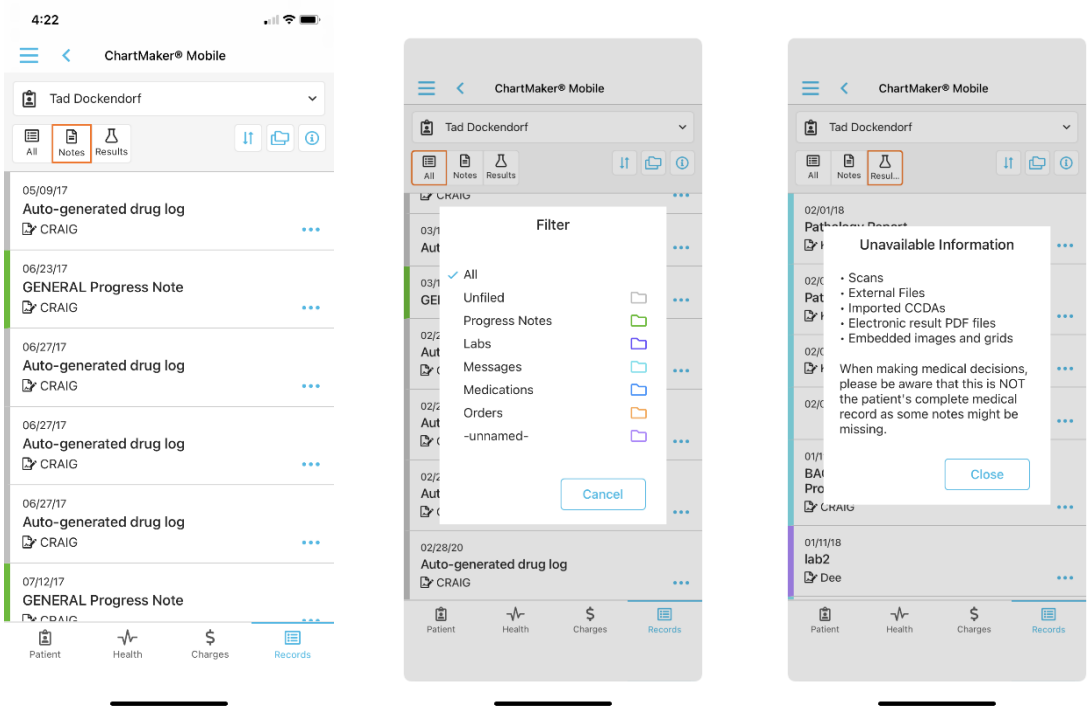
In the Records page you can scroll through the available notes and labs for the patient. The notes will be color-coded in the app based on the folder in which that note resides in, which matches the folder colors in Clinical.

You can tap the **All** option at the top of the list to view all types of notes, or you can filter the notes to view only chart notes by tapping the **Notes** option at the top of list, or you can view only notes that contain results by tapping the **Results** option at the top of the list. When each of these options are selected, they will become highlighted to indicate the type of filtering.

Likewise, you can filter the notes in descending or ascending date order by tapping the button. The note order defaults to descending date order.

You can also filter chart notes by a specific organizer folder clicking the button.

If you tap the button, an Unavailable Information pop-up will appear outlining what information is not viewable in ChartMaker Mobile.



21. Once the desired note is located, you can tap that note to view the details in the Note Details screen or tap a lab to view the details in the Result Details screen. Do note, if you do not have **Transcription** privileges, signed notes will not be accessible.

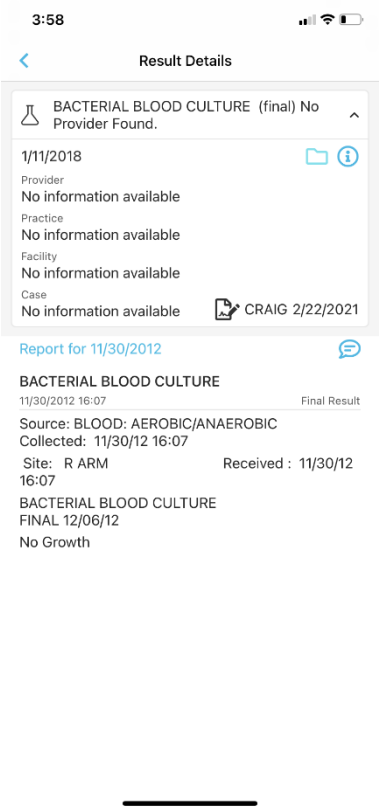
    At the top of the Notes Details and Result Details screens, the Chart Header information will appear outlining the note **Date**, **Provider**, **Facility**, **Case**, **Signed by**, and **Folder** information in a similar manner as it appears in Clinical. The chart header information can be hidden by tapping the **Chart Name** at the top of the screen.

    When viewing note information in the Notes Details screen, embedded objects such as imported CDA documents, images, grid data, and other external file information, as well as any information entered through the Confidential widget, will not be available for viewing at this time. Likewise, when viewing lab result information in the Result Details screen, some parts of the lab such as embedded PDFs and scanned images will not be available for viewing at this time. **Therefore, be aware, that you may not be viewing the patient's complete medical record, in the mobile app, when making medical decisions.** If you need to view this information you will have to open the patient's record in the Clinical application.

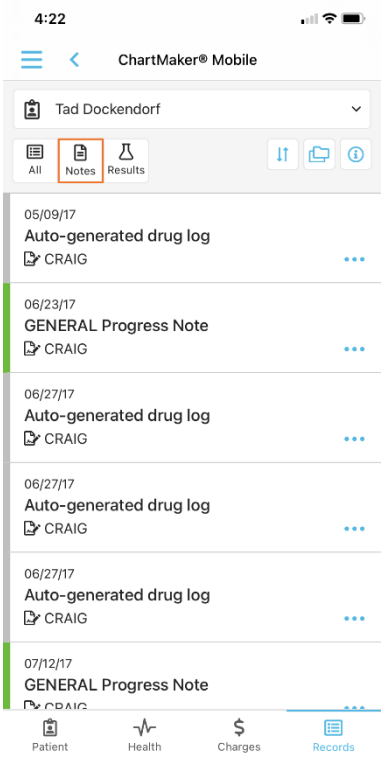
    In the Note Details and Result Details screens you can scroll up and down to view additional information in the note or lab. Likewise, you can swipe right to left to advance to the next note or lab in the list, or swipe left to right to view the previous note or lab in the list, without leaving the Note Details or Result Details screen.

    When viewing a lab in the Result Details screen, you can view the reporting info for the lab by clicking **Report info for MM/DD/YYYY** link. This will open a Report Info page listing the **Status**, **Lab Name**, **Patient Name**, **Patient DOB**, **Date Reported**, **Date Collected**, **Ordering** provider, **Attending** provider, **Date Entered**, **Requisition**, **Patient Lab ID**, and **Control Number** for the select lab. Likewise, if there are any comments for the lab an icon will appear to the right of the Report info link, and if you tap it the comment will display.

    When finished viewing the note or lab information, tap the **<** icon in the left corner to return to the Records page for the selected patient.



22. When finished viewing information in this page, tap the Patient icon to access the Patient screen, or the Health icon to access the Health screen, or tap the Charges icon to access the mobile Charges screen, or tap the **<** icon in the top left to go back to the Patient Search screen.

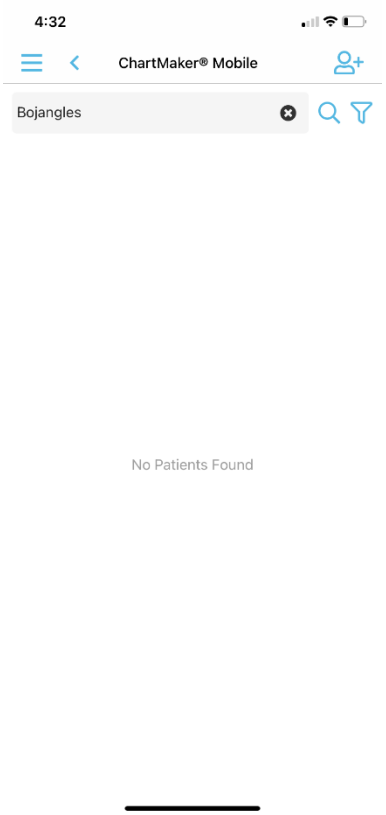


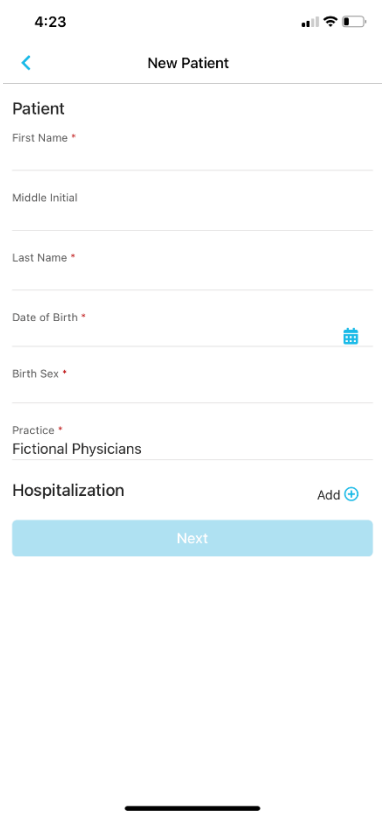
Add a New Patient

When either in the **Home** screen or in the **Patient Search** screen, you can add a new patient in ChartMaker® Mobile, as needed. After a new patient has been created, you can then enter a charge for that patient, if applicable, but do note, when new patients are added through ChartMaker® Mobile, they are given a status of NPI (New Patient Incomplete Information), and their status will need to be activated in Practice Manager prior to processing any pending charges. Use the following steps to add a new patient in ChartMaker Mobile.

1. To add a new patient in the Home screen, tap the ; to add a new patient in the Patient Search screen, tap the icon.

2. In the New Patient screen, enter the patient's **First Name**, **Middle Initial**, and **Last Name** in the corresponding fields. The first and last name are required.

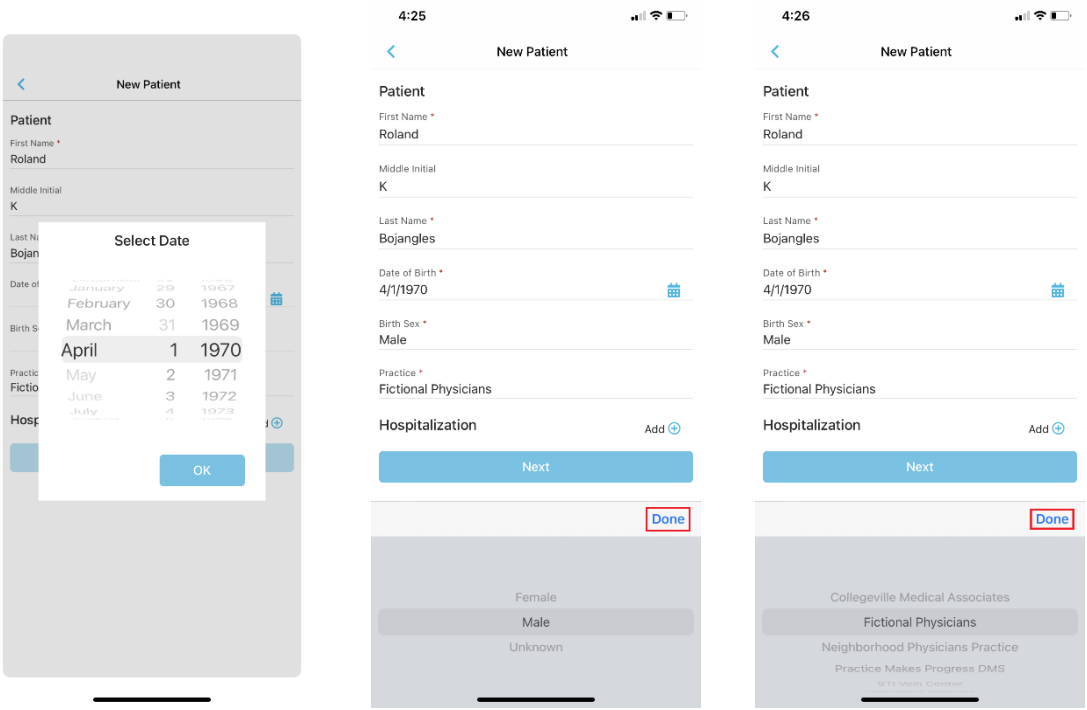




3. Tap in the Date of Birth field, and then manipulate the calendar to set that patient's date of birth. In the calendar, you can scroll up and down for the **Month**, **Day**, and **Year** until the proper date of birth is selected, and then tap the **OK** button.

4. Next tap in the Birth Sex field, then select the desired **Birth Sex**, and then tap **Done**.

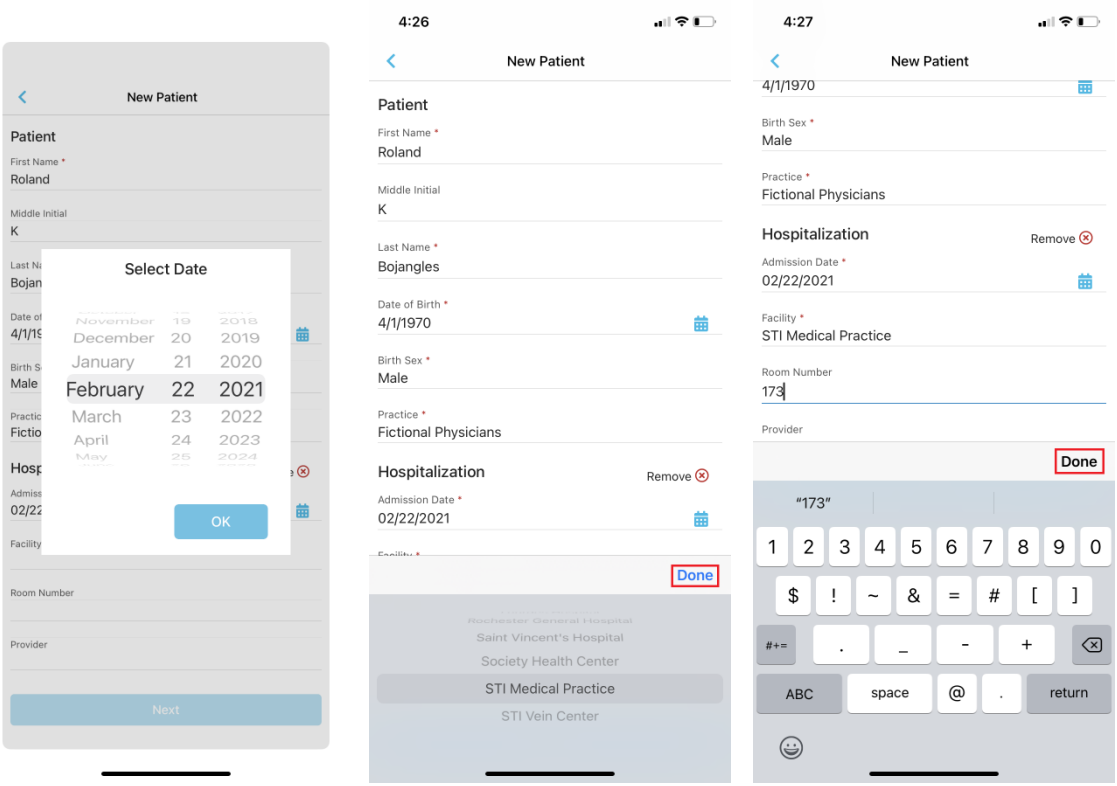
5. Next tap in the Practice field, then select the desired **Practice**, and then tap **Done**.



6. The Hospitalization section, of the New Patient screen, allows you to enter a hospitalization record for the new patient, if needed. When entering a new patient in the New Patient screen that has been accessed via the **Home** screen, the **Patient** > **Patient Search** or the **Charges** > **Mobile Charges** > **Patient Search** path, the Hospitalization section will default closed and is optional, but the Admission Date and Facility will toggle to become required if any information is entered in any of the fields in the Hospitalization section. Tap Add ⊕ to add Hospitalization information. Do note, once the Hospitalization section has been activated, you can stop entering this information by tapping the Remove ⊗ option.

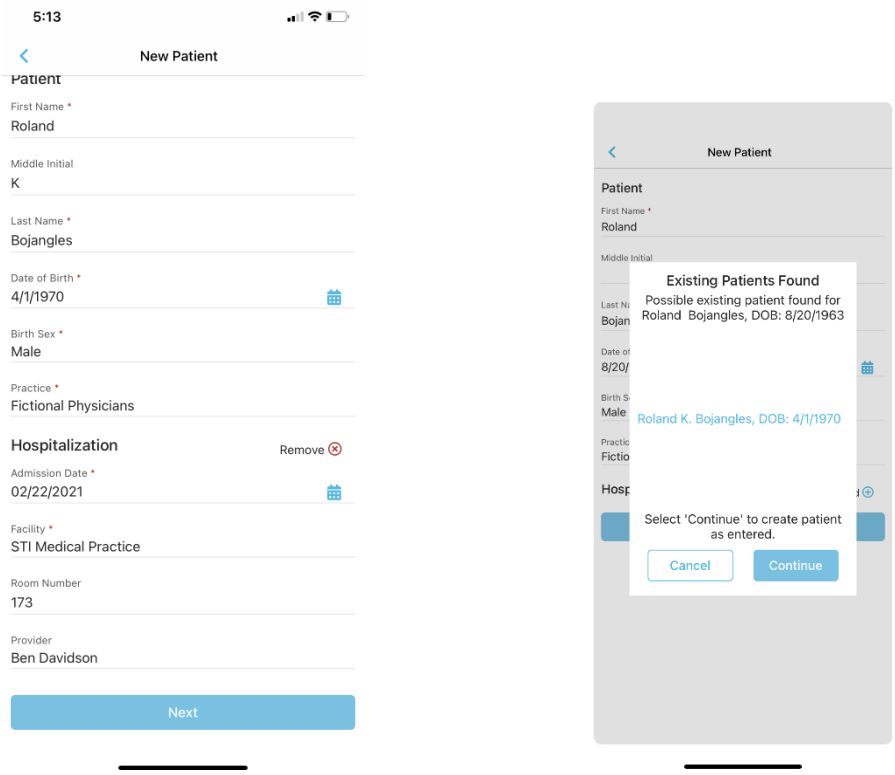
   When entering a new patient in the Patient Search screen that has been accessed via the Rounding List, the Hospitalization section will default open and the Admission Date and Facility fields will be required.

   You can then tap into the corresponding fields and enter or select any **Admission Date**, **Facility**, **Room Number**, and **Practice** information in the Hospitalization section, as needed.



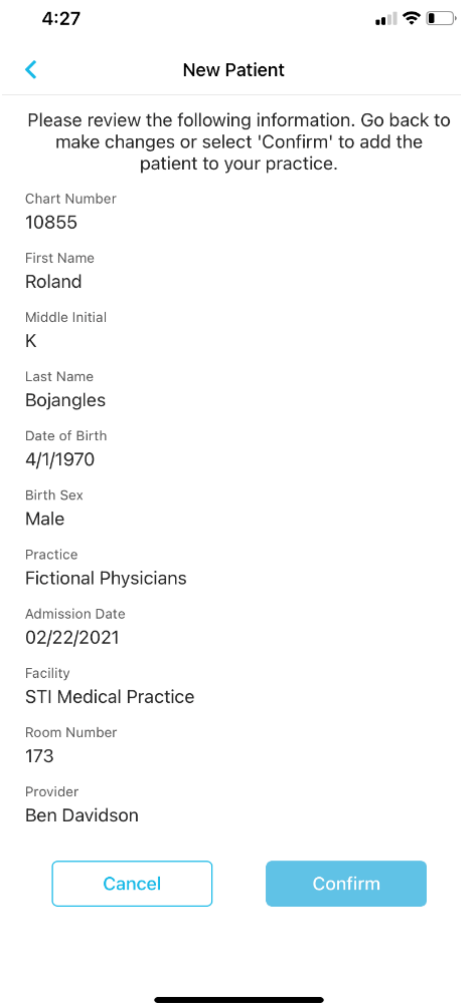
7. After the applicable patient information has been configured, tap the **Next** button.

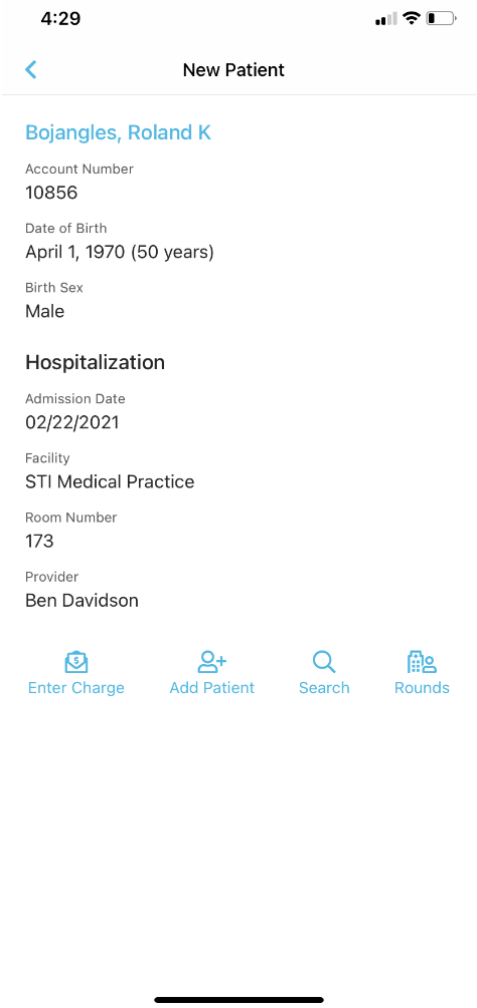
8. The system will check for any duplicate patients, and if there are similar patients, an **Existing Patients Found** message will appear displaying the similar patients. You can then tap **Continue** to continue adding the patient as entered or tap **Cancel** to go back to the New Patient screen and modify the patient's information, or you can tap the existing patient in blue to access the correct patient.



9. The configured patient information will then appear for confirmation. If everything is correct, you can tap the **Confirm** button to add the patient.

10. The patient will then be created, and you will then be able to enter a charge, add another patient, search for a patient, or access the rounding area, by tapping the appropriate link below. Do note, however, when adding a patient via the **Rounding List**, once the Confirm button has been tapped, you will return to the Rounding List with the hospitalization record listed.





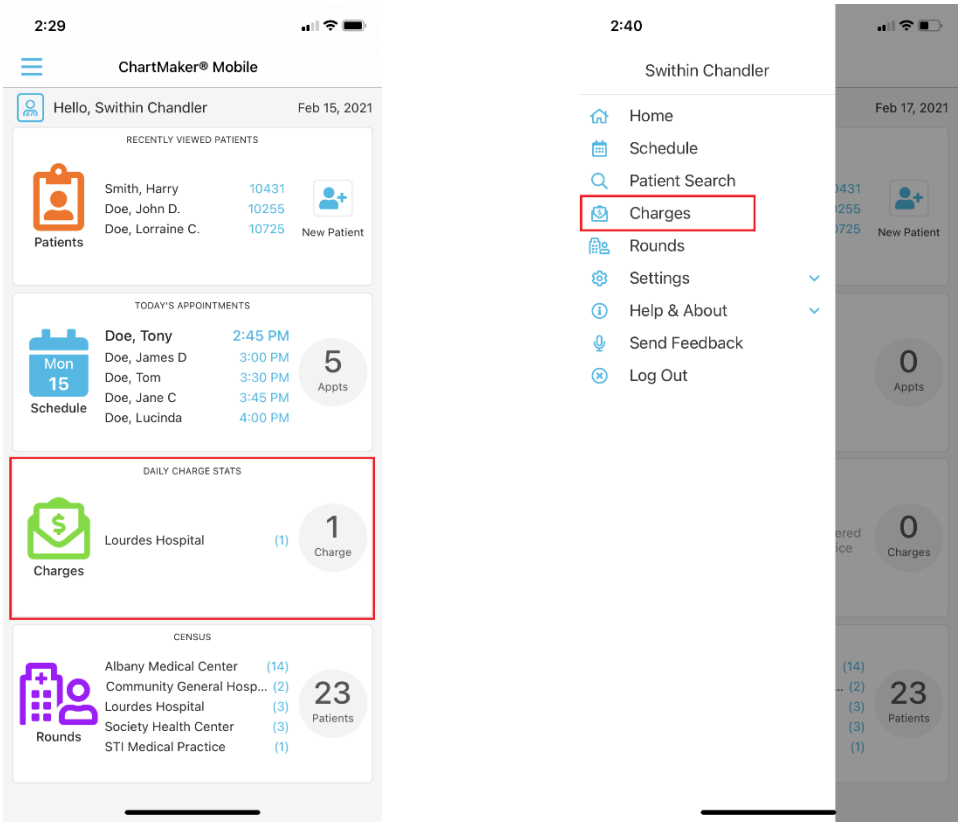
Charges

The Mobile Charges screen allows you to easily add charges for patients and send them to Practice Manager for processing. When entering charges, you can add provider, facility, procedure, diagnosis, modifier, practice, and case information, as well as entering supplemental comments for the charge. You have the ability enter a new charge, or to copy a charge previously sent from ChartMaker® Mobile. The following sections will walk you through entering a new charge, copying a previously sent charge, as well as viewing the charge details for previously sent charges.

Enter a New Charge

Use the following steps to access the Mobile Charges screen to add and send a new charge for a patient.

1. To access the Mobile Charges screen, tap the **Charges** section in the Home page, or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Charges**.

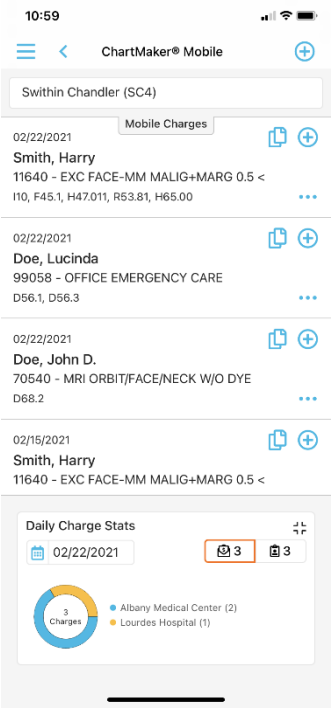


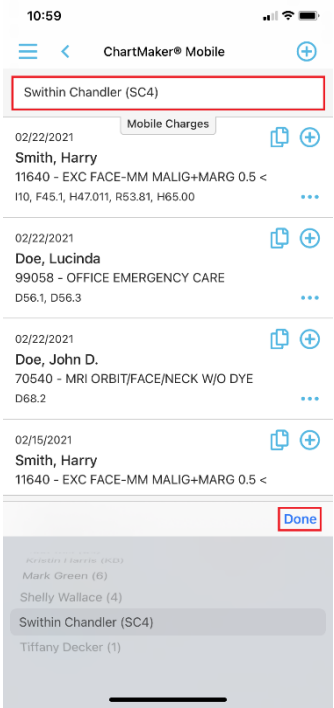
2. The Mobile Charges screen will display as list any charges that have been entered via ChartMaker Mobile for the selected provider, as well as **Daily Charge Stats** for a selected day, that appears at the bottom of the screen, for the selected provider.

   You can tap the ⊕ icon in the upper-right in the title bar to add a new charge for a patient.

   Or, from the Mobile Charge list, you can access the Charges Details screen for a patient's charge by tapping the applicable charge or by tapping the corresponding ••• icon; or you can copy a previously sent charge for a patient by tapping the corresponding icon; or you can add a new charge for a patient by tapping the corresponding ⊕ icon.

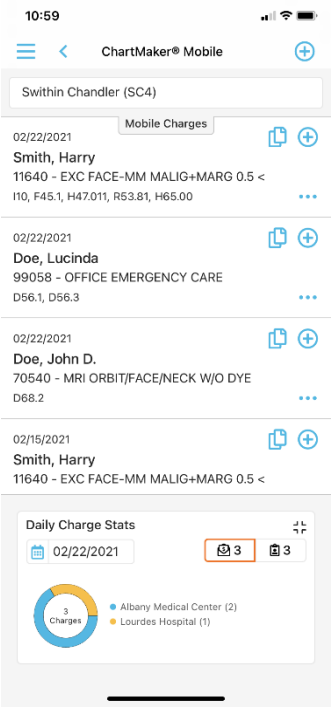
   To change the provider, tap the **Provider** option, then select the applicable **Provider**, and then tap **Done**.

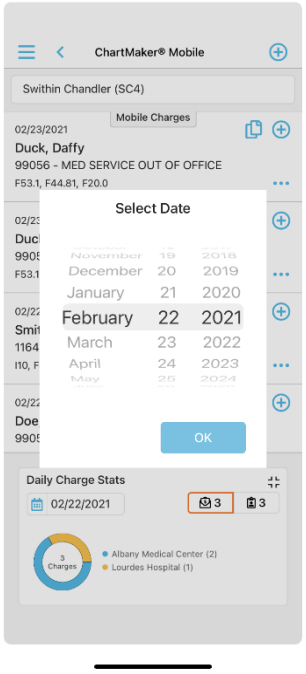




4. The **Daily Charge Stats** section allows you to view a breakdown of the **Charges** (total number of charges sent for the selected day) and the **Patients** (the total number of patients for whom you have sent mobile charges for on the selected day), with a pie chart graphically representing the data by each facility depending on whether Charges or Patients is selected. If you tap on either **Patient** 3 button, patient information will be displayed, or if the **Charges** 3 button, charge information. An orange border will appear around the button selected. Likewise, you can tap the icon in the upper-right of this section to hide the pie chart and facility breakdown.

   The date for the daily stats will default to today's date, however, if you tap the Date field, a Select Date pop-up will appear allowing you to change the date. In the calendar, you can scroll up and down for the **Month**, **Day**, and **Year** until the proper date is selected, and then tap the **OK** button.

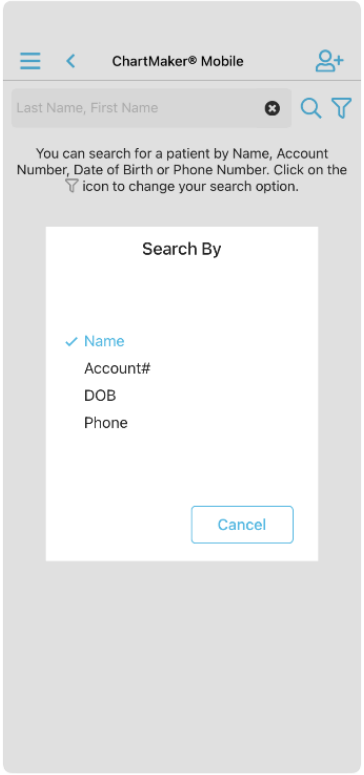




5. To enter a new charge for patient that is not listed in the charge list, tap the icon in the upper-right in the title bar, and then go to step 6.

   To enter a new charge for a patient listed in the Mobile Charges section, tap the corresponding icon, and then go to step 9.

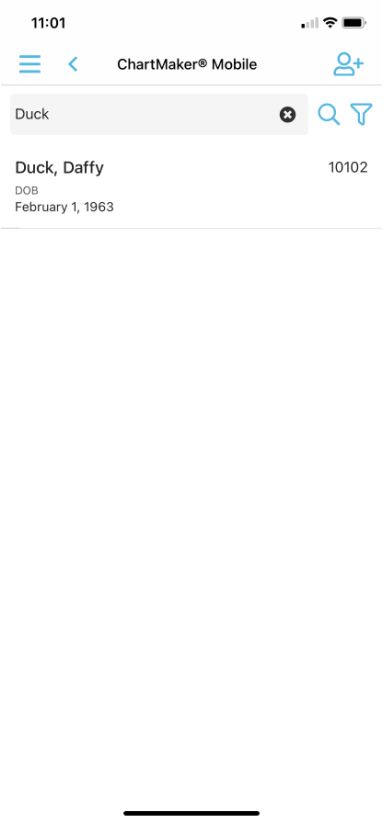
6. In the Patient Search screen you can search for the patient for whom you want to enter a new charge. You can tap the button to access the **Search by** screen where you can configure to search by **Name**, **Account #**, **DOB**, or **Phone**. Tap the desired choice or tap the **Cancel** button.

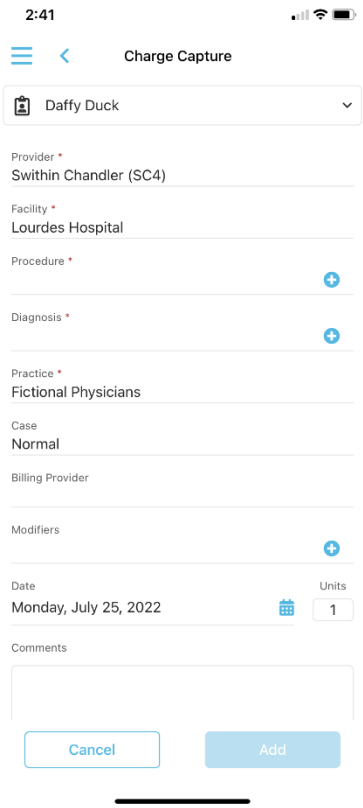


7. In the Search field, enter relevant **Search Criteria**, then tap the icon to the right, and the system will return any matches.

   ****NOTE*****
   When in the Patient Search screen, if a patient is not found, you can add a new patient by tapping the icon. See the Add a New Patient section above for further details for adding new patients.

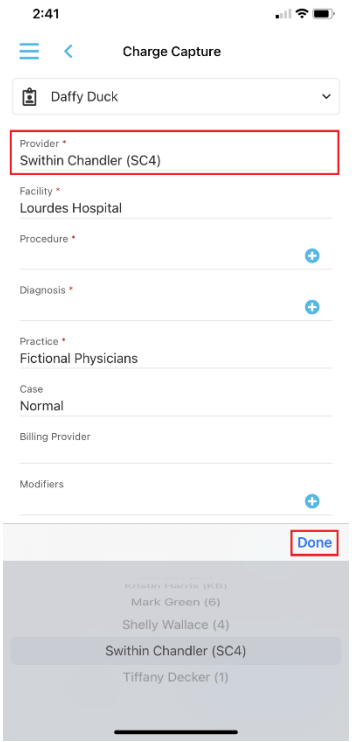
8. Once the patient for whom you want to capture charge information is located, tap that **Patient**, and the Charge Capture screen will appear for the selected patient.

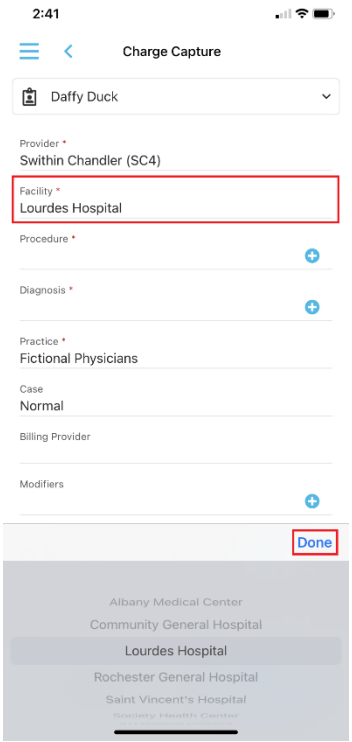




9. In the Charge Capture screen, the Provider information will default to the provider linked to your username. Tap in the Provider field, then select the desired **Provider**, and then tap **Done**, if needed.

10. The Facility information will default to the facility used for the last charge entered by the user. Tap the Facility field, then select the desired **Facility**, and then tap **Done**, if needed.



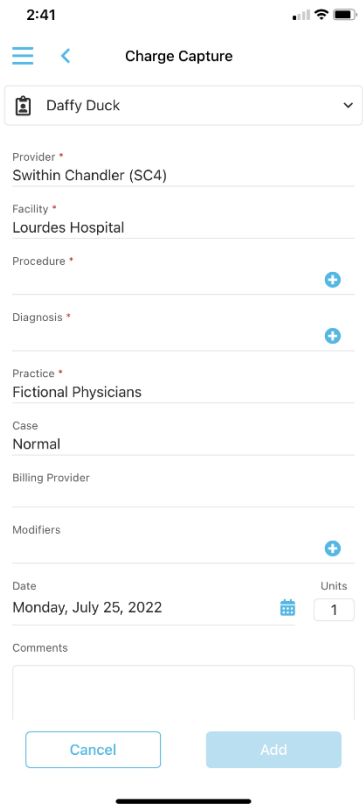


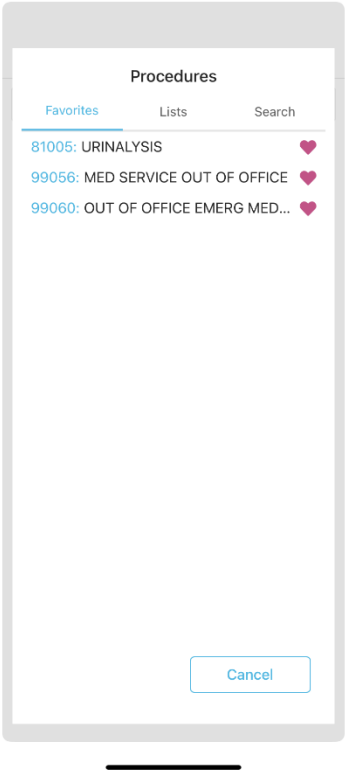
11. After the provider and facility information has been selected as desired, tap the icon in the **Procedure** field to select the procedure you want to add for the charge.

12. The Procedures screen will then appear with the **Favorites** option selected, listing any procedures that you tagged as favorite. When selecting procedures for the charge, there are three screens you can access: **Favorites**, **Lists**, or **Search**.

    In the favorites screen, tap the **Procedure Code** you want to add for the charge from the favorites list, or tap **Lists** to access the procedure lists, or tap **Search** to access the procedure search screen.
    Search

    *****NOTE*****
    If you have not selected any favorite procedures, a message will appear in the Favorites screen, outlining that you can create a favorites list by tapping the empty heart icon next to the applicable procedure so that it becomes solid when in the procedure search screen. Likewise, in both the favorites and procedure search screens, you can remove procedures from the favorites list by tapping the solid heart icon next to the applicable procedure so that it becomes empty.

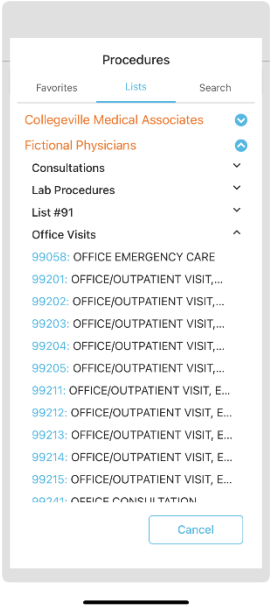


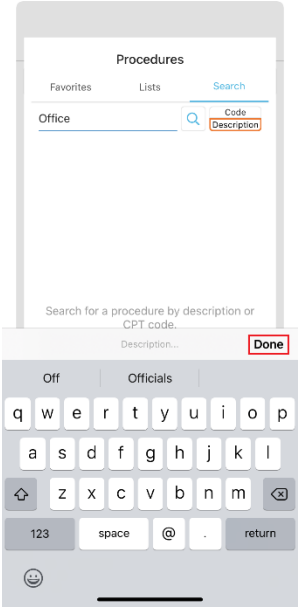


13. In the procedure lists screen, any practices that have practice-level procedure lists will be displayed in orange. You can toggle the practices open and closed by tapping the **Practice**. Within each practice, you can toggle open and closed the procedure lists by tapping the **Procedure List** you want to open/close.

    Tap the **Procedure Code** you want to add for the charge from the procedure lists or tap **Favorites** to access the favorites screen, or tap **Search** to access the procedure search screen.

14. In the Procedure Search screen, you can search for procedures by Description or Code. To change the search parameter, tap **Code** or **Description** and an orange border will surround the selected option; then enter the applicable **Search Criteria** in the search field, and then tap the button.



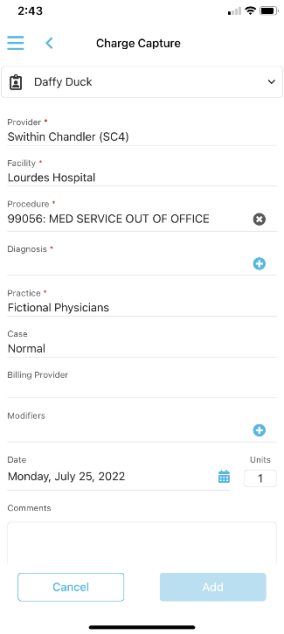


15. The system will display any matches. Tap the **Procedure Code** you want to add for the charge from the list or you can modify the Search Criteria and tap the button, if needed, to search for and select a different procedure that is not displayed. Or tap **Favorites** to access the favorites screen, or tap **Lists** to access the procedure lists.

    *****NOTE*****
    When in the procedure search screen, you can tag any procedures as a favorite by tapping the empty heart icon next to the applicable procedure so that it becomes solid or remove any procedures from the favorites by tapping the solid heart icon next to the applicable procedure, so it becomes empty.

16. After the applicable procedure has been selected for the charge, it will appear in the Procedure field in the Charge Capture screen. If you need to remove the procedure, tap the corresponding icon next to the procedure, or if you need to change the procedure, tap the **Procedure** and you will access the Procedures screen where you can navigate to find the procedure you want to add for the charge.

17. After the procedure information has been selected, tap the icon in the **Diagnosis** field to select the diagnoses you want to add for the charge capture.



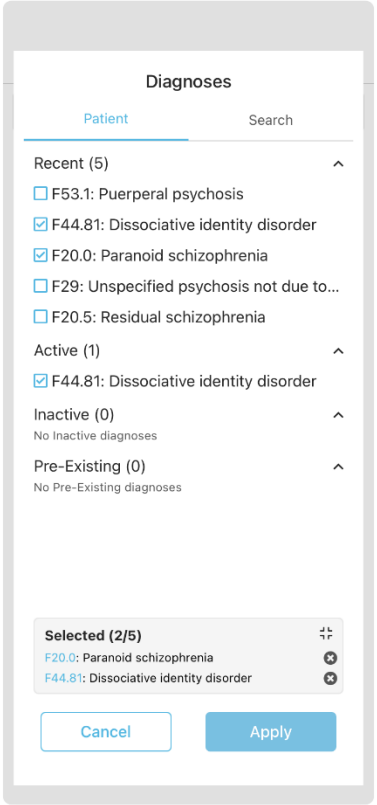
18. The Diagnoses screen will then appear with the **Patient** option selected, listing any **Recent**, **Active**, **Inactive**, and **Pre-Existing** diagnoses for the patient. You can toggle each of these diagnosis types open and closed by tapping the diagnosis type, as needed.

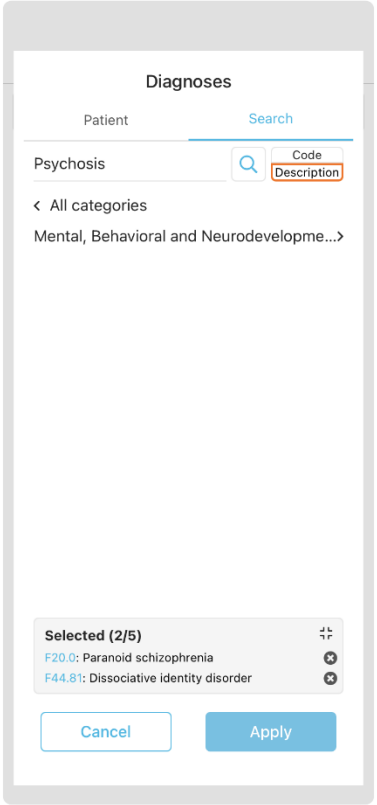
    When selecting diagnosis codes for the charge, you can select among these codes, or tap **Search** to search for a specific code not listed in these areas.

    To select a diagnosis, tap the applicable code so that a check appears in the corresponding box. You can attach up to five diagnosis codes.

    At the bottom of the Diagnoses screen a **Selected** section will appear once you have selected a diagnosis, keeping track of the number of codes selected. You can remove a diagnosis from this section by tapping the corresponding ⊗ icon. You can also tap diagnosis codes in the above sections to remove them. You can minimize this area to show only Dx Codes by tapping the icon in the upper-right of this section.

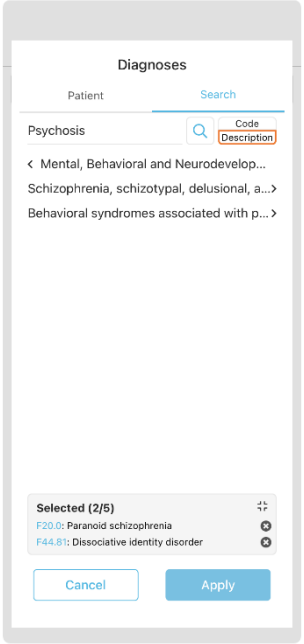
19. If the Search area, you can search for the diagnoses by Description or Code. To change the search parameter, tap **Code** or **Description** and an orange border will surround the selected option; then enter the applicable **Search Criteria** in the search field, and then tap the button and the system will narrow the diagnostic tree based on your search criteria.

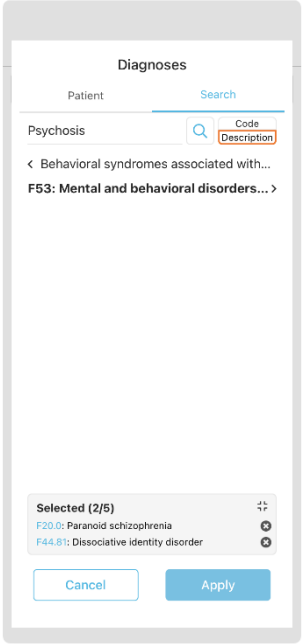




20. You can then tap through the various diagnostic **Categories** until you locate the billable diagnosis code you want to select.

    *****NOTE*****
    When searching for diagnoses **by code** the system will navigate the result to the exact category searched for. Any sub-categories will then be listed below. Likewise, above the search results you can then tap the **<** option to navigate to broader categories that the search criteria fall under.

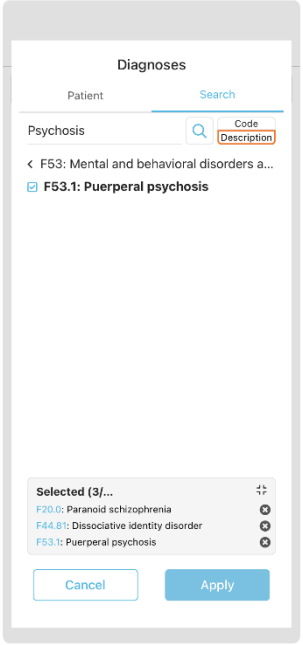


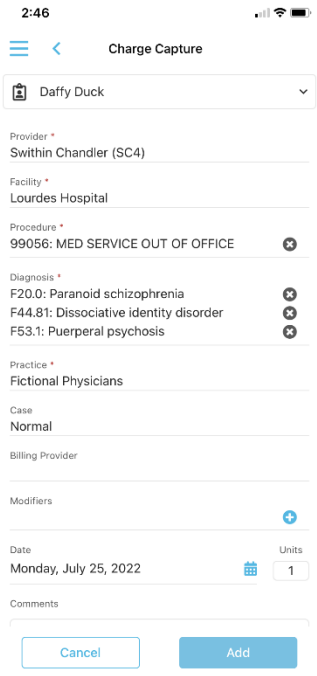


21. After you have located the billable diagnosis code you want to add, tap that **Diagnosis** and a checkmark will appear next to it.

22. You can then modify the **Search Criteria** to search for a different diagnosis code or tap the Patient option to access the patient area where you can view any **Recent**, **Active**, **Inactive**, and **Pre-Existing** diagnoses for the patient. Or, if all the applicable diagnosis codes have been selected, tap the Apply button.

23. After the applicable diagnosis codes have been selected for the charge, they will appear in the Diagnosis field in the Charge Capture screen. If you need to remove a diagnosis, tap the corresponding ⊗ icon next to the diagnosis, or if you need to add or modify diagnoses, tap the **Diagnosis** field and you will access the Diagnoses screen where you can navigate to find the diagnoses you want to add for the charge.

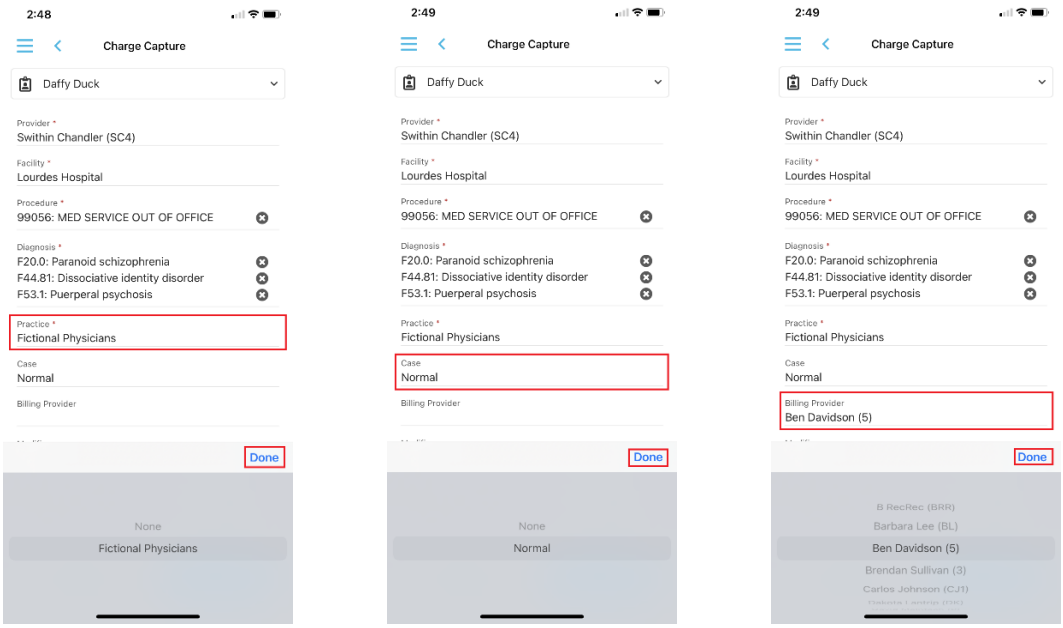




24. After the diagnosis information has been selected, you can add or modify the Practice, if needed. The Practice will default to the default practice configured in the User Preferences. To add or change the practice, tap in the Practice field, then select the desired **Practice**, and then tap **Done**, if needed.

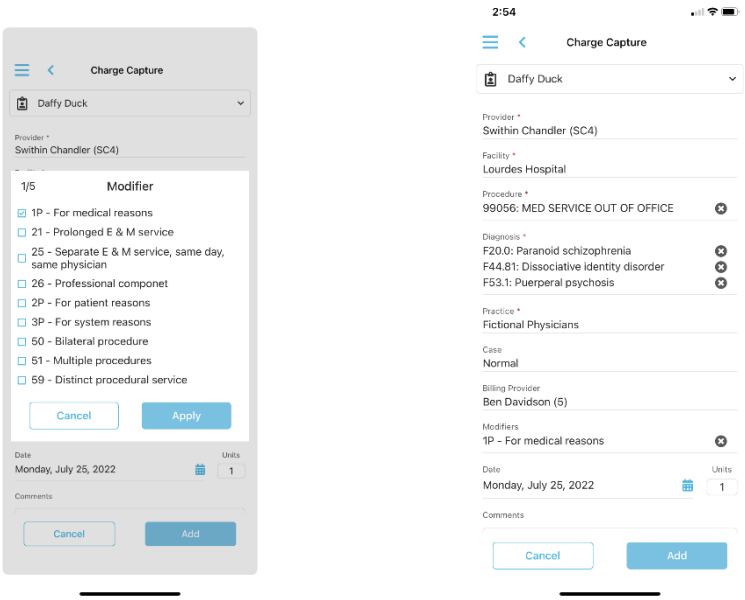
25. You can modify the case, if needed, by tapping in the Case field, then select the desired **Case**, and then tapping **Done**.

26. You can select a Billing Provider for the charge, if needed, by tapping the Billing Provider field, then selecting the desired **Billing Provider**, and then tapping **Done**.



27. Tap the ⊕ icon in the **Modifiers** field to select any modifiers you want to add for the charge. A Modifiers pop-up screen will appear listing the modifiers in the system. To select a modifier, tap the applicable code so that a check appears in the corresponding box. You can attach up to five modifiers.

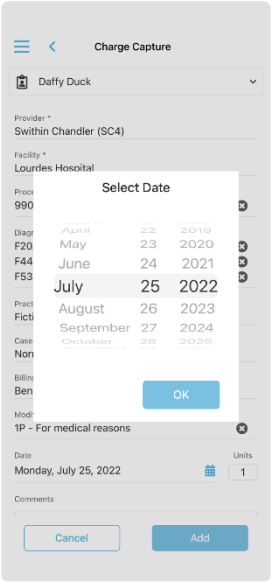
28. After the applicable modifier codes have been selected for the charge, they will appear in the Modifier field in the Charge Capture screen. If you need to remove a modifier, tap the corresponding ⊗ icon next to the modifier, or if you need to add or modify diagnoses, tap the **Modifier** field and you will access the Modifier screen where you can check and uncheck the modifiers you want to add for the charge.

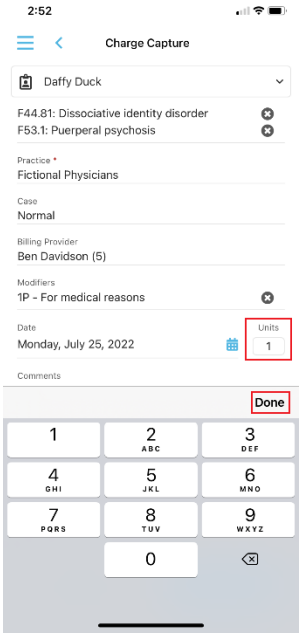


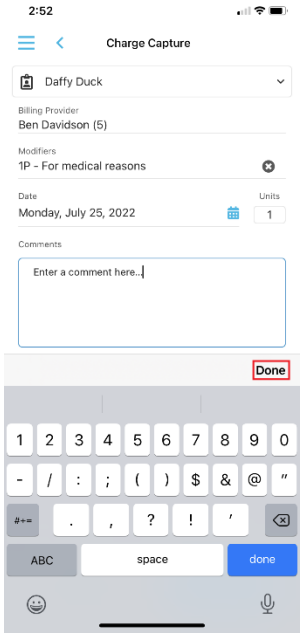
29. The Date will default to today's date. To modify this date for the charge, tap the **Date**, and a Select Date pop-up will appear allowing you to change the date. In the calendar, you can scroll up and down for the **Month**, **Day**, and **Year** until the proper date is selected, and then tap the **OK** button.

30. To modify the billable units, if needed, tap into the **Units** field, then the number pad will activate in bottom of the screen allowing you to enter the desired **Units**, and then tap **Done**.

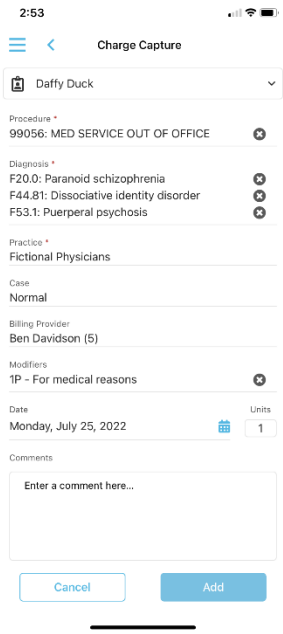
31. You can then enter any additional comments for the charge by tapping into the Comments field, entering any applicable text, up to 2048 characters, and then tapping **Done**.

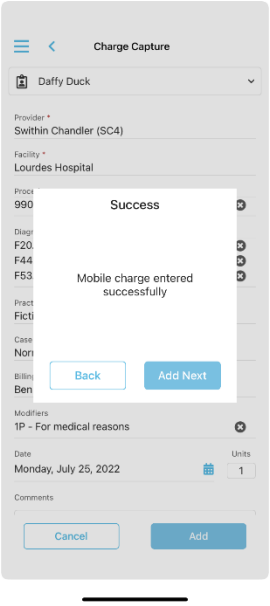






32. After all the charge information has been configured as desired, tap the **Add** button to add the charge and send it to Practice Manager. When the charge is finished sending, a Success pop-up will appear. The charge will appear in the **Charge** > **Pending Charges** tab in Practice Manager. Tap the **Add Next** button to add another charge for this patient, or tap the **Back** button if finished, and to return to the Mobile Charges screen.





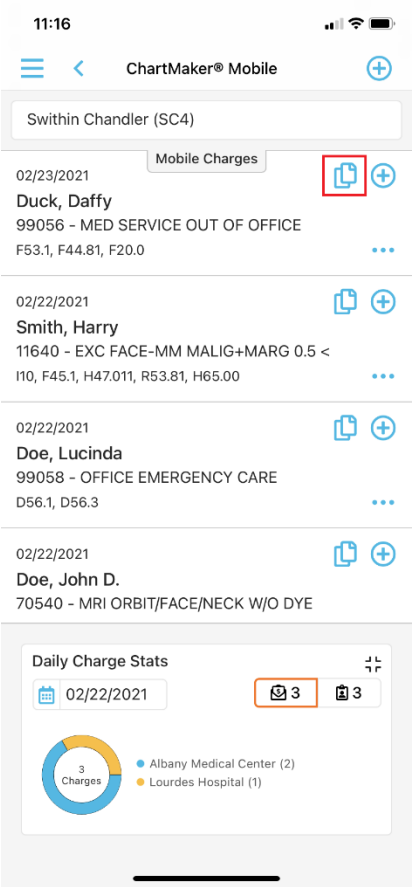
COPY A PREVIOUSLY SENT CHARGE

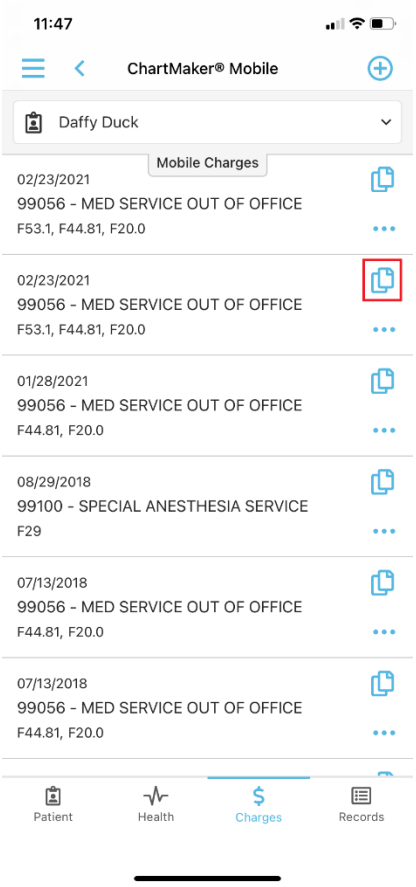
You can copy a previously sent charge in the Mobile Charges screen. You also can copy a previously sent charge in the Mobile Charges screen (accessed via Patient area), the Charge Details screen, the Rounding List, and the Discharged screen. For further information about copying charges in Rounds area see the applicable Rounds sections below. Use the following steps to copy a previously sent charge, make any applicable modifications, and send that charge for a patient via the Mobile Charges screen.

1. To access the Mobile Charges screen, tap the **Charges** section in the Home page, or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Charges**.

   Or, to access charges for a particular patient you can tap the applicable patient if they are listed in the Patient section of the Home screen. Or, if they are not listed in the Home screen, tap the **Patient** option in the Home page, or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Patient Search**. You can then search and access the applicable patient, and then tap the $ Charges icon to access the mobile Charges screen.

2. In the Mobile Charges screen, you can then locate the charge that you want to copy, and then tap the corresponding icon.

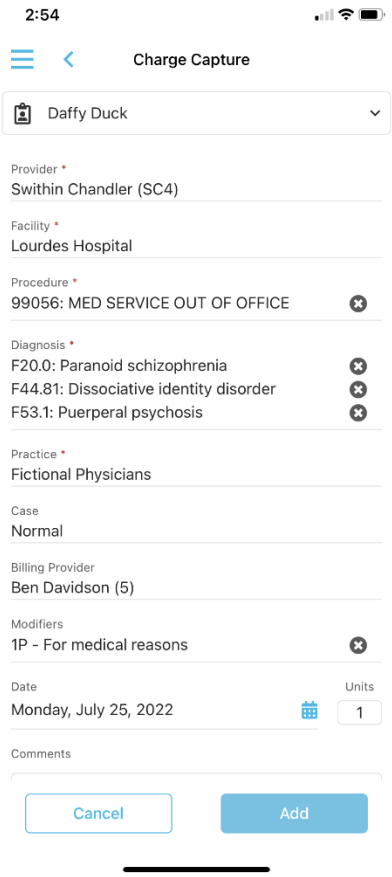


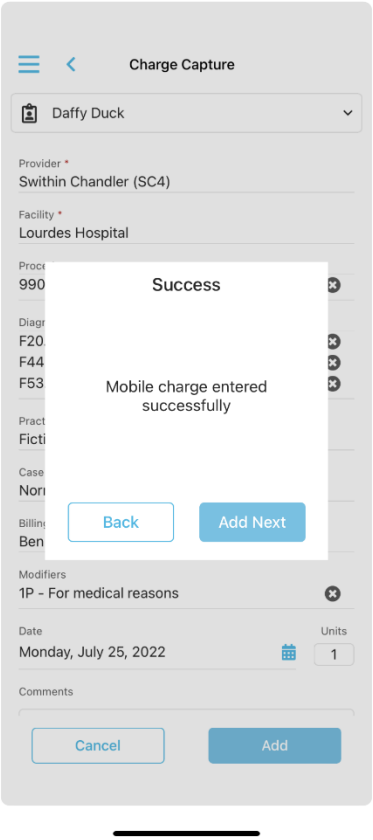


3. When copying charges, after tapping the icon, you will then enter the Charge Capture screen where the procedure and the diagnoses from the previous charge will be populated in the corresponding fields. The provider will default to the user logged in if that user is a provider. If the user logged in is not a provider, and has previously sent charges, the provider from the previous charge will be populated. If the user logged in is not a provider, and has not previously sent charges, the Provider field will be blank and will need to be configured. The Date for the copied charge will default to today's date, and the Practice will default based on User Preferences. Comments will not be copied.

   You can add and modify the charge information as needed. The Provider, Facility, Procedure, Diagnosis, and Practice are required to send the charge.

4. After all the charge information has been configured as desired, tap the **Add** button to add the charge and send it to Practice Manager. When the charge is finished sending, a Success pop-up will appear. The charge will appear in the **Charge** > **Pending Charges** tab in Practice Manager. Tap the **Add Next** button to add another charge for this patient, or tap the **Back** button if finished, and to return to the Mobile Charges screen.





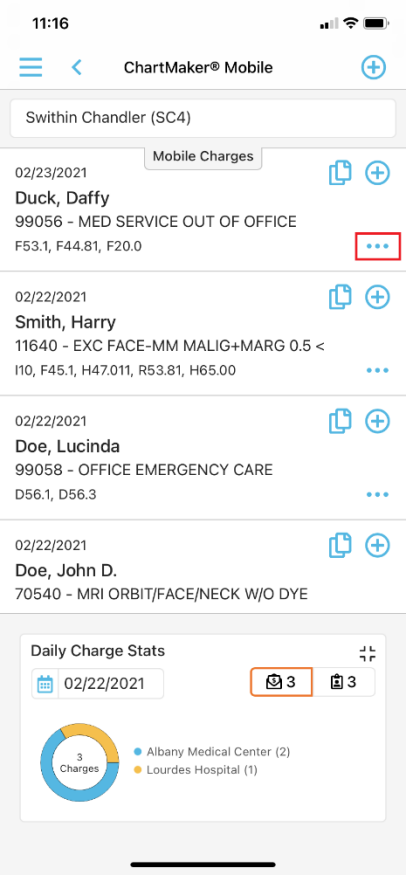
View Charge Details for Previously Sent Charges

In the Mobile Charge screen the charges that have been previously sent for the selected provider via ChartMaker® Mobile. For each of these charges you can review the details of the charge, as well as copy that charge, and/or add a new charge. Use the following steps to access the Charge Details screen to review detail information for a previously sent charge.

1. To access the Mobile Charges screen, tap the **Charges** section in the Home page, or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Charges**.

   Or, to access charges for a particular patient you can tap the applicable patient if they are listed in the Patient section of the Home screen. Or, if they are not listed in the Home screen, tap the **Patient** option in the Home page, or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Patient Search**. You can then search and access the applicable patient, and then tap the $ Charges icon to access the mobile Charges screen.

2. In the Mobile Charges screen, you can then locate the charge that you want to view the details for, and then tap the applicable charge or tap the corresponding ••• icon.



3. In the Charges Details screen, the charge details for the selected charge will be displayed. You can copy this charge by tapping the icon in the upper-right in the title bar or can add a new charge for this patient by tapping the icon in the upper-right in the title bar. For more information about adding and copying charges see the Charges section below. When finished viewing the Charge Details, tap the **<** to return to the Mobile Charges screen.

Rounds

The Rounds option allows access to a Rounding List where you can view a hospital rounds patient list for each separate facility, and/or hospital, outside of your office, where you see patients. The hospital rounding list is based on information added in the Patient Hospitalization dialog in Practice Manager. Any patient with an open hospitalization record (where a discharge date *has not been configured*), will be displayed for each applicable facility. The Rounding List will display the patient's name, date of birth, admission date, and room number, as well as giving you the option to copy a previous charge, add a new charge, or access to a Rounding Details screen where you indicate that a patient has been skipped (for those patients where a charge has not been entered for the current day), discharge a patient, view visit details, and view any charges that have been sent for that visit.

The following sections will walk you through accessing and viewing the Rounding List, accessing and viewing the Rounding Details for a patient, skipping a patient, discharging a patient, and viewing the Discharged list.

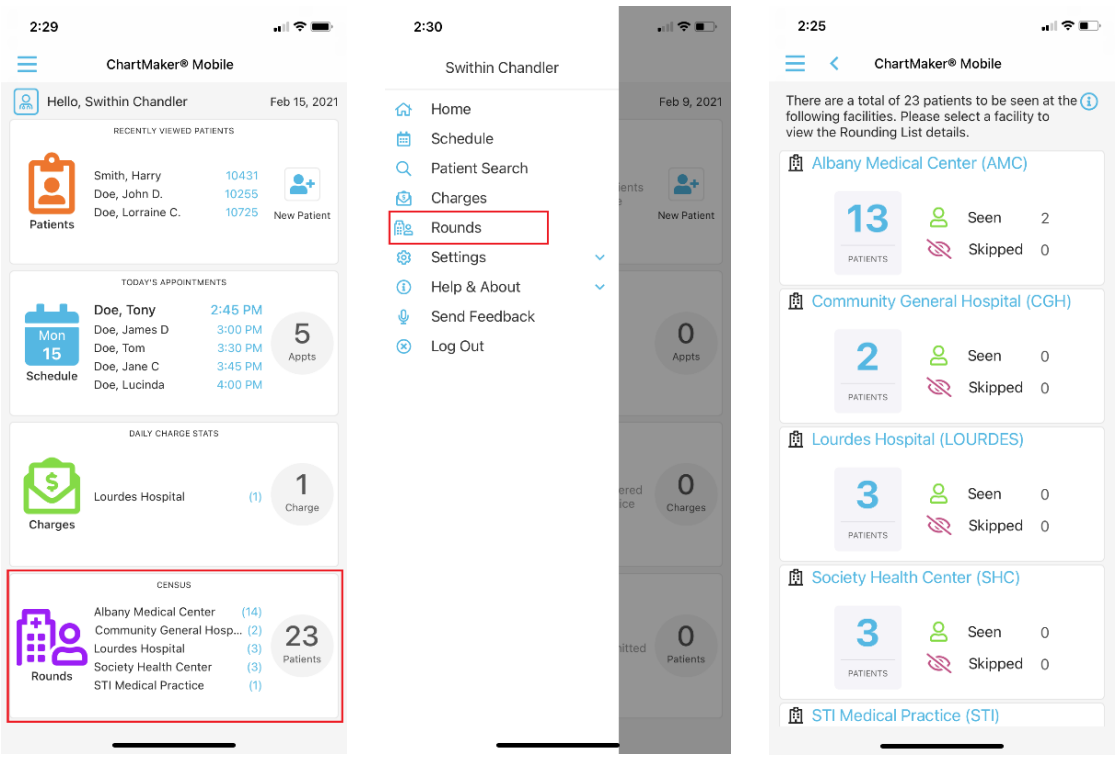
Access and View the Rounding List for a Facility

In the Rounding List, you can view a hospital patient list for the selected facility, with options to add and edit hospitalization records for a patient, copy a charge, enter a new charge, or access the Rounding Details for those patients. Use the following steps to access and view the Rounding List screen for a facility.

1. The Rounds section of the Home screen will contain a Census that lists all the facilities that have hospitalized patients along with the patient count in parentheses after the facility, with the total patients to the far right.

   If you tap the Rounds icon or tap the ☰ icon in the top-left to access the Mobile menu, and then tap **Rounds**, you will access a Census screen that will display each facility, the total number of patients within each facility, and the number of patients seen and/or skipped out of that patient total for each facility.

   To access the Rounding List for a facility, either tap the patient count in parentheses in the Census list in the Home screen or tap the applicable **Facility** in the Census screen.



2. In the Rounding List screen, the facility and each applicable patient will be listed along with their date of birth, admission date, and room number for the date range listed below the Facility field. If you need to change the facility, tap the **Facility** field, then select the desired **Facility**, and then tap **Done**. You can then tap the **From** and **To** date to modify the date range as needed. Likewise, you can tap the button to filter the patients by **Practice** and/or **Provider**. You can also order the patients by **Admitted** date, **Name**, or **Room #**, by tapping the corresponding button below the date fields. The currently selected option will be highlighted by an orange border. After these options have been selected, the number of patients for the date range and filtered patients will appear below the date range next to the icon.

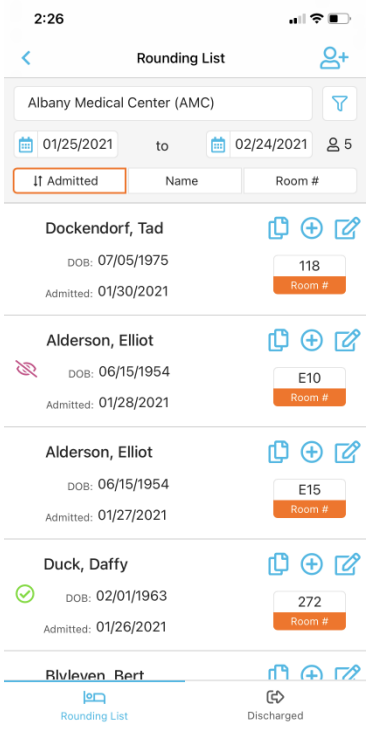
   Any patient that has an icon next to their name has been skipped, and any patient that has an icon next to their name has had a charged entered for the current date for the selected facility and is considered to have been seen. Patients without an icon next to their name have been neither skipped, nor had a charge entered, and therefore are considered not seen.

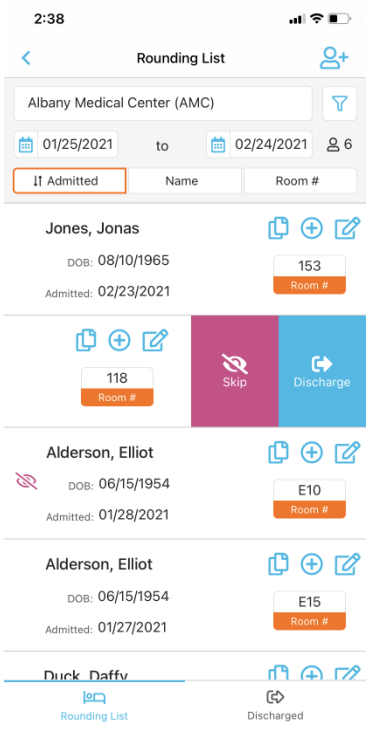
   In the Rounding List you can copy a previously sent charge for a patient by tapping the corresponding icon, add a new charge for a patient by tapping the corresponding icon, or access the Rounding Details screen for the patient by tapping the corresponding icon.

   You can also swipe right to left on a patient to display a **Skip** and or a **Discharge**, allowing you to easily select any of these options. The Skip and Discharge options can also be accessed in the Rounding Details screen.

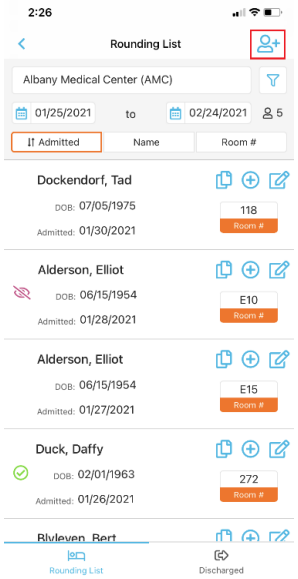
   You can also add a hospitalization record for a new or existing patient by tapping the icon in upper-right of the title bar.

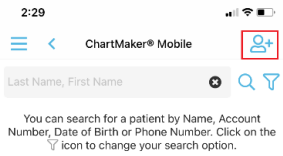
   Likewise, you can tap the Discharged icon at the bottom of the screen to access the Discharged screen which displays the patients that were discharged via ChartMaker® Mobile. The Rounding List icon allows to toggle back to the Rounding List screen.





3. To add a hospitalization record for a patient, tap the icon in upper-right of the title bar to access the Patient Search screen so you can add a new hospitalization record for an existing patient, or add a hospitalization record for a new patient by the by tapping icon.



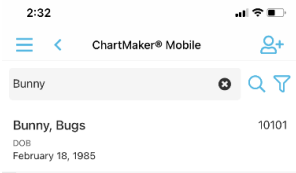


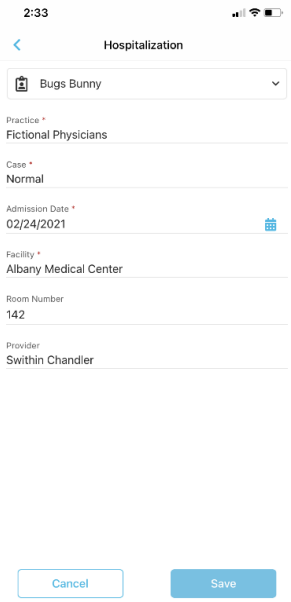
4. *To add a hospitalization record for an existing patient*, tap into the Search field, enter relevant **Search Criteria**, then tap the icon to the right, and the system will return any matches.

   *****NOTE*****

   You can tap the button to access the **Search by** screen where you can configure to search by **Name**, **Account #**, **DOB**, or **Phone**. You can then tap the desired choice or tap the **Cancel** button.

Once the applicable patient is located, tap that patient to access the Hospitalization screen. In the Hospitalization screen, you can enter or select the applicable **Practice**, **Case**, **Admission Date**, **Facility**, **Room Number**, and **Provider**, and then tap the **Save** button. The Practice, Case, Admission Date, and Facility are required before you can save the hospitalization record. If the patient is only in one practice, that practice will default, and if the patient has only one case, that case will default. After the applicable information has been configured and saved, the patient will appear in the Rounding List.

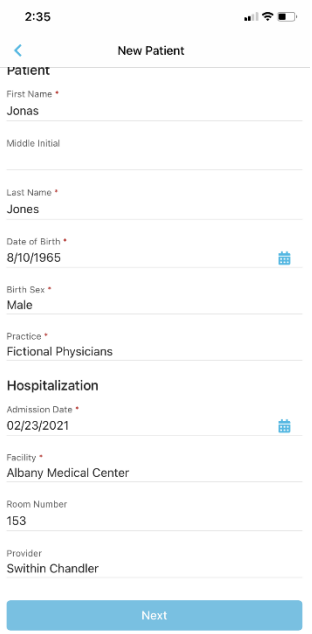


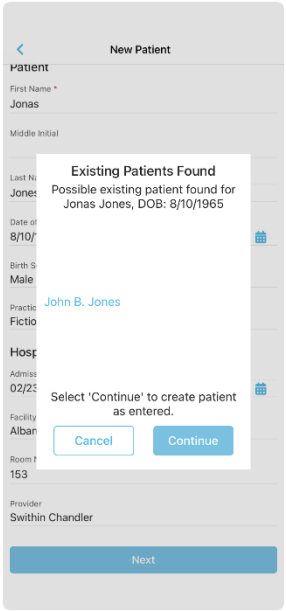


To add a hospitalization record for a new patient, when in the Patient Search screen, tap the icon. In the New Patient screen, you can enter or select the **First Name**, **Middle Initial**, **Last Name**, **Date of Birth**, **Birth Sex**, and **Practice**; and then in the Hospitalization section, you can enter or select the

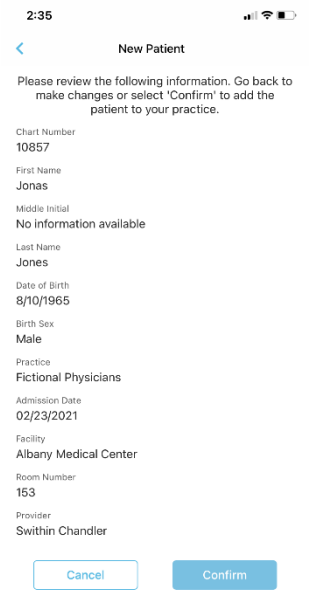
applicable **Admission Date**, **Facility**, **Room Number**, and **Provider**, and then tap the **Next** button. The First Name, Last Name, Date of Birth, Birth Sex, Practice, Admission Date, and Facility are required before you can continue.

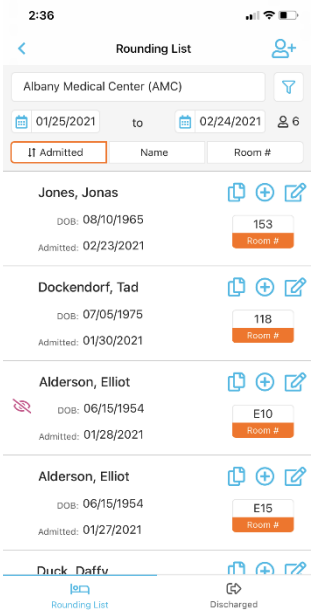
*****NOTE*****
The system will check for any duplicate patients, and if there are similar patients, an **Existing Patients Found** message will appear displaying the similar patients. You can then tap **Continue** to continue adding the patient as entered or tap **Cancel** to go back to the New Patient screen and modify the patient's information or you can tap the existing patient in blue to access the correct patient.





The New Patient screen will provide a summary of the new patient information for you to review and confirm. Tap the **Confirm** button to add the new patient and accompanying hospitalization record. After the applicable information has been confirmed, the patient will appear in the Rounding List.

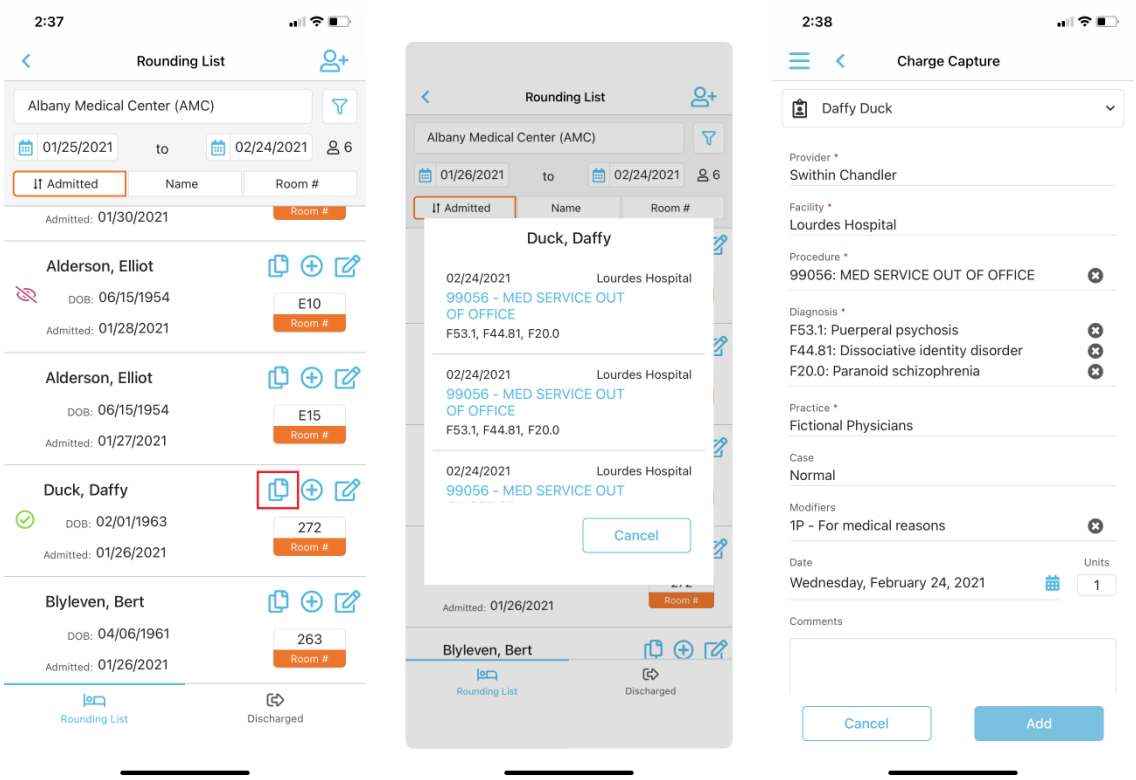




5. When copying a charge, tap the icon next to the applicable patient in the Rounding List, and a pop-up screen that will display a list of the five (5) most recent charges sent from ChartMaker® Mobile for the patient. Once the correct charge has been located, tap the applicable charge you want to copy.

You will then enter the Charge Capture screen where the procedure and the diagnoses from the previous charge will be populated in the corresponding fields. The provider will default to the user logged in if that user is a provider. If the user logged in is not a provider, and has previously sent charges, the provider from the previous charge will be populated. If the user logged in is not a provider, and has not previously sent charges, the Provider field will be blank and will need to be configured. The Service Date for the copied charge will default to today's date, and the Practice will default based on their configured User Preference. Comments will not be copied. You can add and modify the charge information as needed. The Provider, Facility, Procedure, Diagnosis, and Practice are required to send the charge. After all the charge information has been configured as desired, tap the **Add** button to add the charge and send it to Practice Manager. When the charge is finished sending, a Success pop-up will appear. Tap the **Add Next** button to add another charge for this patient, or tap the **Back** button if finished, and to return to the Rounding List.

For further details on copying previously sent charges for a patient, see the Copy a Previously Sent Charge section above.



6. When adding a charge, tap the ⊕ icon next to the applicable patient in the Rounding List, and you will access the Charge Capture screen and the Provider field will default as described when copying a charge in step 4, the Facility field will default to the facility from the Rounding List, and the Service Date will default to today's date. You can add and modify the charge information as needed. The Provider, Facility, Procedure, Diagnosis, and Practice are required to send the charge.

   For further details on capturing a new charge for a patient, see the Enter a New Charge section above.

7. To skip or discharge a patient in the Rounding List, swipe right to left on the applicable patient, and then tap **Skip** or **Discharge**.

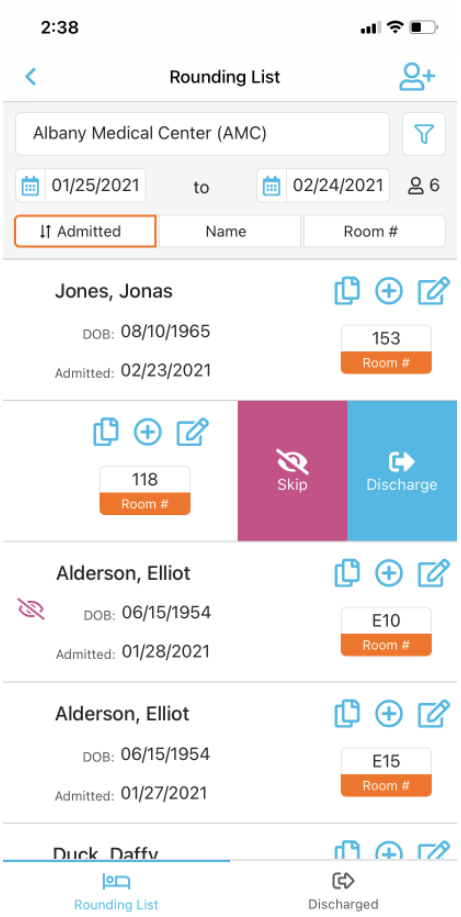
   When skipping a patient via the Rounding List, you can undo that skip, should the patient be mistakenly skipped, by swiping right to left on the skipped patient, and then tapping **Skip**.

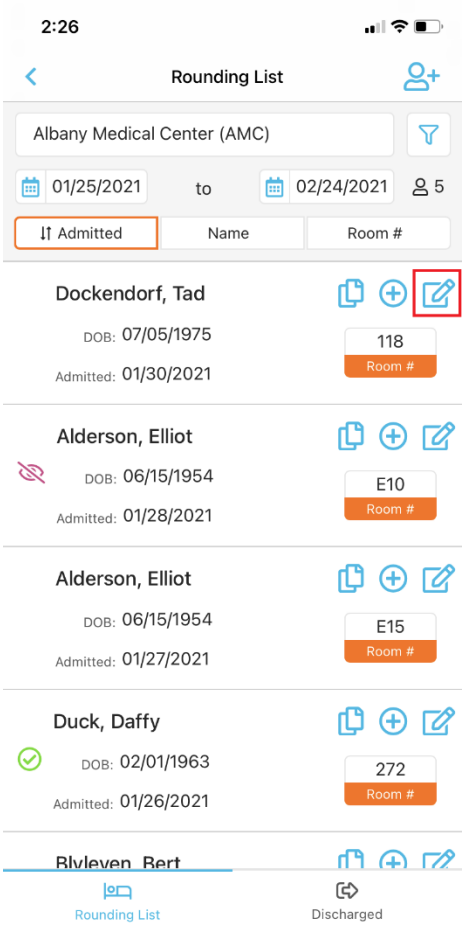
   When discharging a patient via the Rounding List, the system will automatically put a discharge date of today's date, the patient will be removed from the Rounding List and moved to the Discharged screen, and the corresponding hospitalization entry in the Patient Hospitalization dialog in Practice Manager will be updated with the discharge date. To undo a discharge, you must access the Discharged screen.

8. To edit the hospitalization record for a patient in the Rounding List, and to access the Rounding Details screen for a patient, tap the corresponding icon.

   For more information about editing hospitalization information and the Rounding Details screen see the Access, View, and Edit the Rounding Details for a Patient section below.

9. When finished viewing the Rounding List, tap the **<** button at the top of the screen to return to the Census or Home screen, or tap the Discharged icon at the bottom of the screen to access the Discharged screen.





Access, View, and Edit the Rounding Details for a Patient

In the Rounding Details screen, you can view today's visit details for the patient, skip a patient (if they were not seen, and no charges were entered), discharge a patient, edit the hospitalization record, as well as view any sent charges for today's visit. Use the following steps to access, view, and edit the Rounding Details screen for a patient.

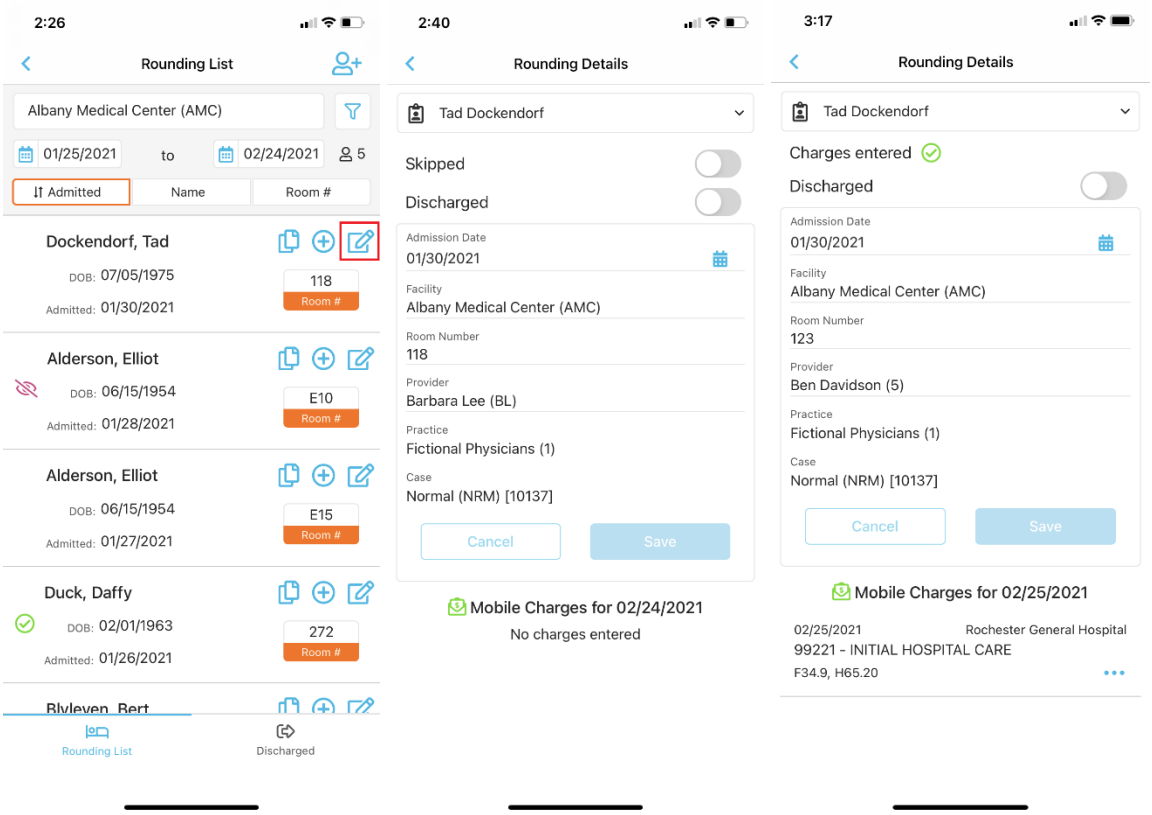
1. To access the Rounding Details screen for a patient, tap the icon next to the applicable patient in the Rounding List screen, or in the Discharged screen.

2. When accessing the Rounding Details screen, the patients name will appear at the top of the screen, if you tap their name the drop-down will display their Account Number, Date of Birth, and Birth Sex.

   The next section will display Skipped and Discharge options. Or, if a charge has already been sent for this patient for today's date, this section will state **Charges entered,** in place of the Skipped option, and only the Discharged option will be available.

   Next, the Hospitalization Information will be listed. You can edit the **Admission Date**, the **Facility**, the **Room Number**, and the **Provider** in this area.

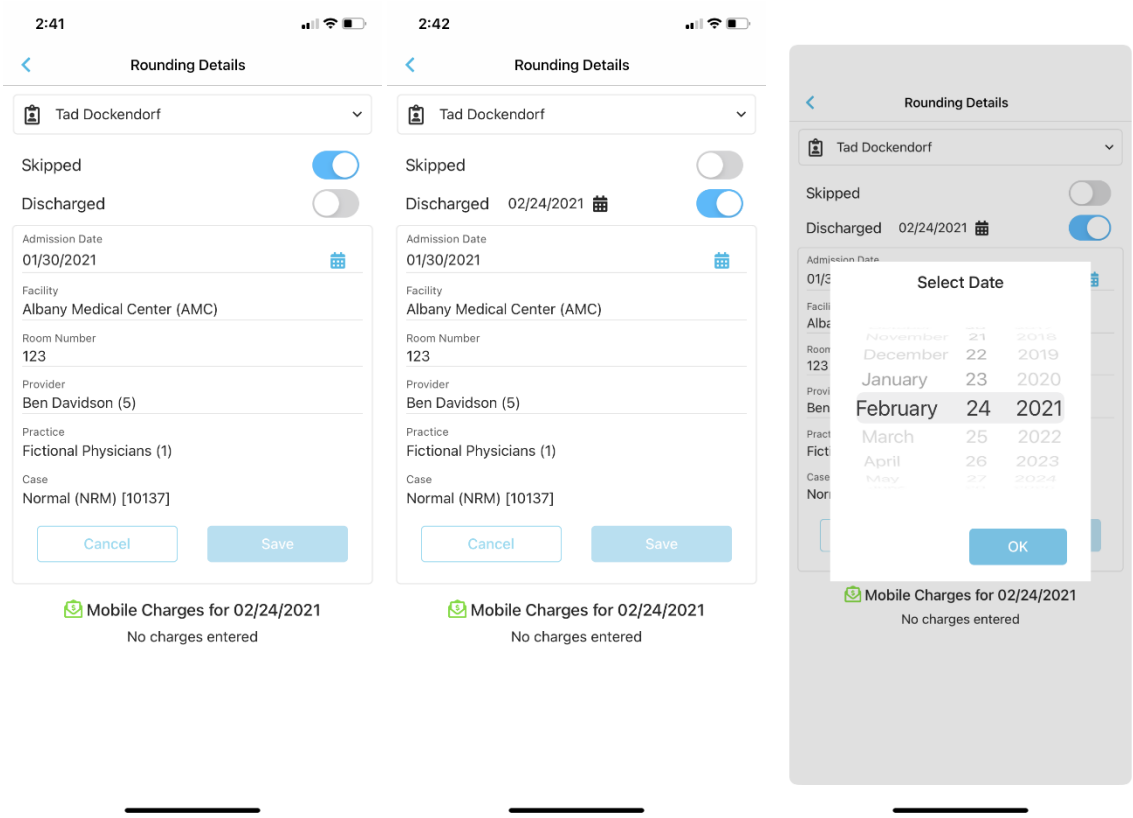
   And then, in the final section, any Mobile Charges entered for today will be listed. If charges were entered, you can tap the charges to view the Charge Details for that charge.



3. To skip this patient, slide the corresponding slider to right. The slider will then turn blue, the patient will then be considered skipped, an icon will appear next to their name in the Rounding List, and they will be added to the skipped total in the Census screen for the facility.

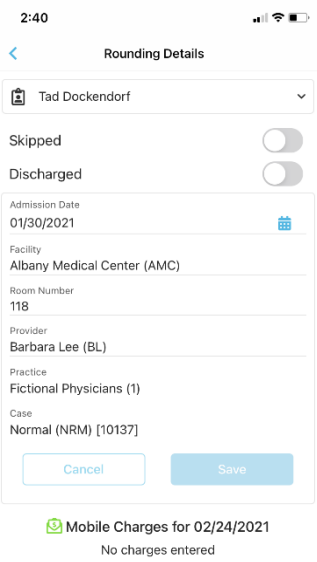
4. To discharge a patient, slide the corresponding slider to right. The slider will turn blue, and Date field will appear with today's date displayed. To change the discharge date, tap the **Date**, and a Select Date pop-up screen will appear. In the calendar, you can scroll up and down for the **Month**, **Day**, and **Year** until the proper date is selected, and then tap the **OK** button.

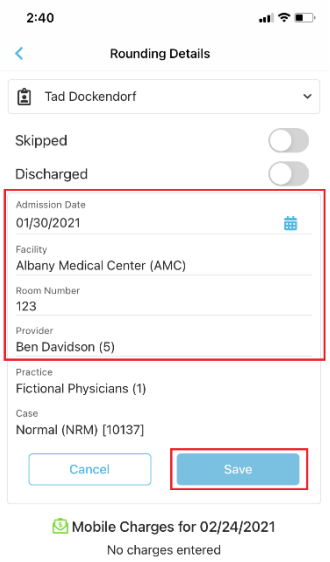
   If the Discharged option was selected when exiting this screen, the patient will be removed from the Rounding List screen and transferred to the Discharged screen, and the corresponding hospitalization entry in the Patient Hospitalization dialog in Practice Manager will be updated with the discharge date.



5. To edit the hospitalization information, tap in the **Admission Date**, **Facility**, **Room Number**, and/or **Provider**, and make the necessary changes as needed, and then tap the **Save** button.

6. When finished viewing and editing the Rounding Details for the patient, tap the **<** button at the top of the screen to return to the Rounding List.





Access and View the Discharged Screen

In the Discharged screen, you can view any patients that were discharged via ChartMaker® Mobile for the selected facility and date range, as well as copy a previously sent charge, add a new charge, and entered the Rounding Details screen for the patient. Use the following steps to access and view the Discharged screen for a facility.

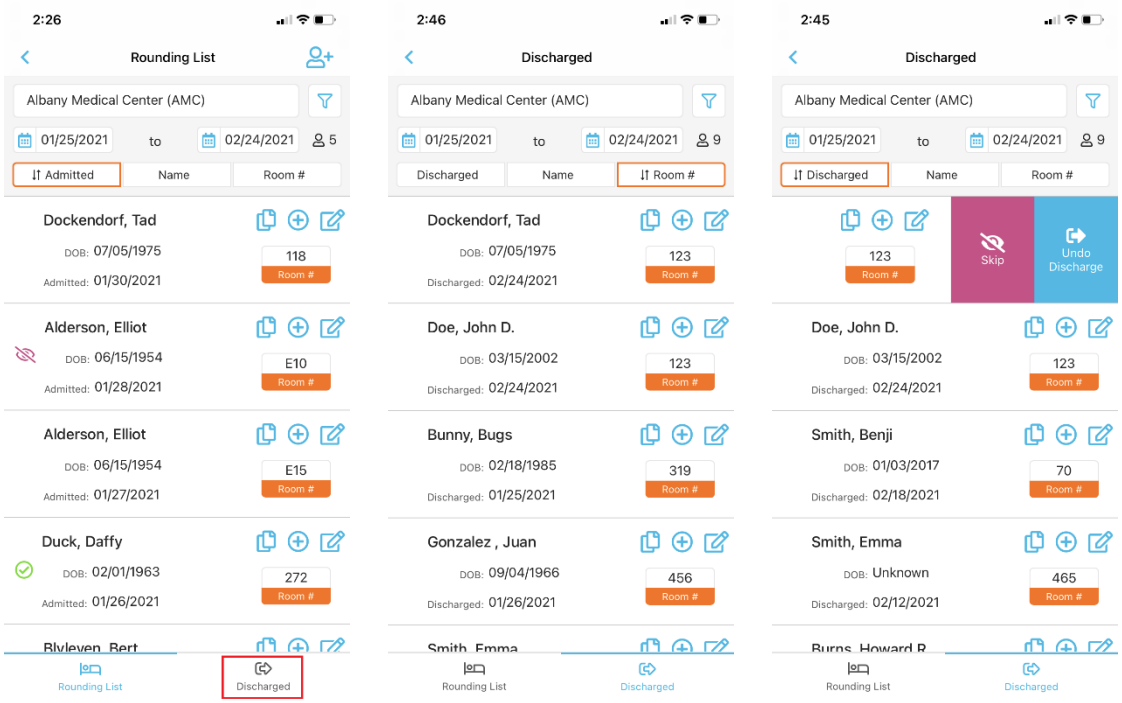
1. To access the Discharged screen for a facility, tap the Discharged icon at the bottom of the Rounding List screen.

2. In the Discharged screen, the discharged patients (along with their date of birth, discharge date, and room number), for the facility you were viewing in the Rounding List screen, will be displayed for the defaulted date range. If you need to change the facility, tap the **Facility** field, then select the desired **Facility**, and then tap **Done**. You can then tap the **From** and **To** date to modify the date range as needed. Likewise, you can tap the button to filter the patients by **Practice** and/or **Provider**. You can also order the patients by **Discharged** date, **Name**, or **Room #**, by tapping the corresponding button below the date fields. The currently selected option will be highlighted by an orange border. After these options have been selected, the number of patients for the date range and filtered patients will appear below the date range next to the icon.

   In the Discharged screen you can copy a previously sent charge for a patient by tapping the corresponding icon, add a new charge for a patient by tapping the corresponding icon, or access the Rounding Details screen for the patient by tapping the corresponding icon.

   You can also swipe right to left on a patient to display a **Skip** and or an **Undo Discharge** option, allowing you to easily select either of these options in the Discharged screen instead of having to access the Rounding Details screen to access these options for the patient.

   Likewise, you can tap the Rounding List icon at the bottom of the screen to access the Rounding List screen, and you can toggle back to the Discharged screen by tapping the Discharged icon in the Rounding List screen.



3. To skip or undo a discharge for a patient in the Discharged screen, swipe right to left on the applicable patient, and then tap **Skip** or **Undo Discharge**.

When skipping a patient via the Discharged screen, you can undo that skip, should the patient be mistakenly skipped, by swiping right to left on the skipped patient, and then tapping **Skip**.

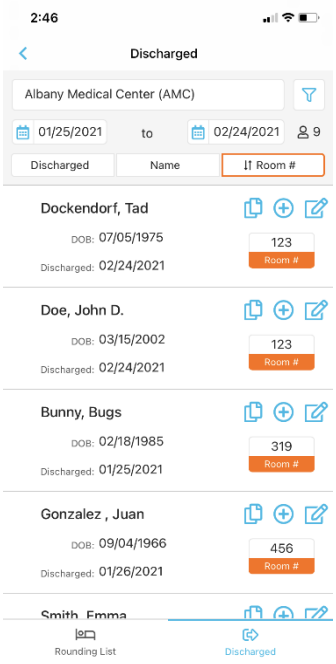
When undoing a discharge for a patient via the Discharged screen, the patient will be removed from the Discharged screen and be moved to the Rounding List with their original admittance date.

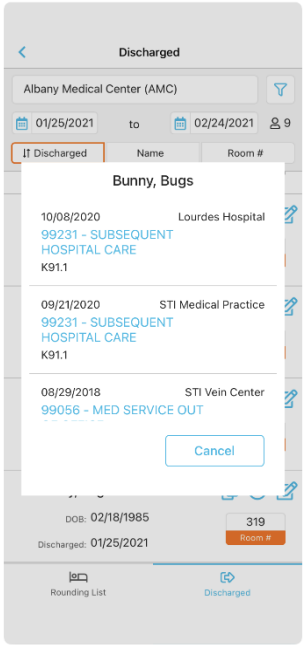
4. To copy a charge, tap the icon next to the applicable patient in the Discharge screen, and a pop-up screen that will display a list of the five (5) most recent charges sent from ChartMaker® Mobile for the patient. Once the correct charge has been located, tap the applicable charge you want to copy.

   You will then enter the Charge Capture screen where the procedure and the diagnoses from the previous charge will be populated in the corresponding fields. The provider will default to the user logged in if that user is a provider. If the user logged in is not a provider, and has previously sent charges, the provider from the previous charge will be populated. If the user logged in is not a provider, and has not previously sent charges, the Provider field will be blank and will need to be configured. The Service Date for the copied charge will default to today's date, and the Practice will default based on their configured User Preference. Comments will not be copied. You can add and modify the charge information as needed. The Provider, Facility, Procedure, Diagnosis, and Practice are required to send the charge. After all the charge information has been configured as desired, tap the **Add** button to add the charge and send it to Practice Manager. When the charge is finished sending, a Success pop-up will appear. Tap the **Add Next** button to add another charge for this patient, or tap the **Back** button if finished, and to return to the Rounding List.

   For further details on copying previously sent charges for a patient, see the Copy a Previously Sent Charge section above.

5. To add a charge, tap the icon next to the applicable patient in the Discharged screen, and you will access the Charge Capture screen and the Provider field will default as described when copying a charge in step 4, the Facility field will default to the facility from the Rounding List, and the Service Date will default to today's date. You can add and modify the charge information as needed. The Provider, Facility, Procedure, Diagnosis, and Practice are required to send the charge. For further details on capturing a new charge for a patient, see the Enter a New Charge section above.

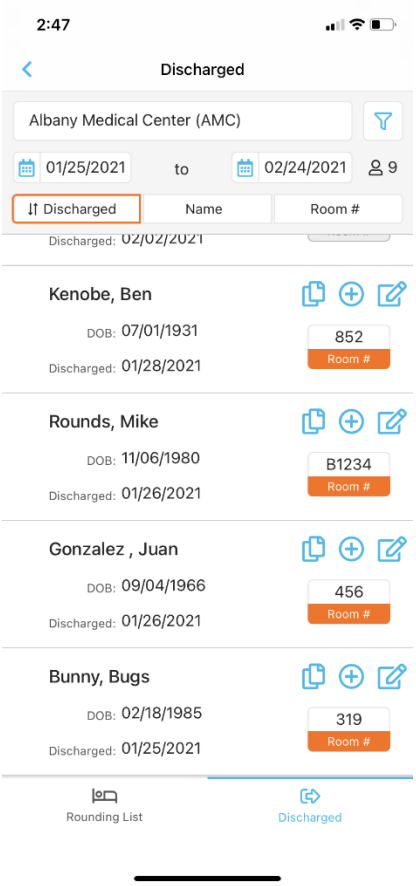




6. To access the Rounding Details screen, tap icon next to the applicable patient in the Discharged screen, the detail information will appear and all the options in this screen will be available, you can

modify and copy information, as needed. For further details on the Rounding Details screen, see the Access and View the Rounding Details for a Patient section above.

7. When finished viewing the Discharged screen, tap the **<** button at the top of the screen to return to the Census screen, or tap the Rounding List icon to toggle back to the Rounding List screen.



Index

Document Change Log

Date	Change
07/26/2022	Updated the Charges section on pages 47 – 57.
03/01/2021	Entire document has been updated.
06/19/20	Update ChartMaker Mobile Enrollment on page 4 with information about Android and iOS compatibility.
05/19/20	Updated the section title for pages 9-10, and updated page 15 with information regarding unlocking users. Also update TOC and Index.
10/03/18	Updated the Add a New Patient section (pages 38 – 40) with updated screen shots and information about hospitalization records; updated the Access and View the Rounding List for a Facility section (pages 56 – 62) with updated screen shots and information about adding and editing hospitalization records for patients. Also updated TOC and Index.
8/3/18	Updated the View Patient Information section (pages 28, 31, 33-34, & 37); updated the Charges section (page 40); updated the Enter a New Charge section (pages 40 -50); updated the Copy a Previously Sent Charge section (pages 52 -53); updated the View Charge Details for Previously Sent Charges (page 54); updated the Access and View the Rounding List for a Facility section (pages 56 – 58); updated the Access and View the Rounding Details for a Patient section with an updated screen shot on page 59; updated the Access and View the Discharged Screen (pages 62-64); updated the Index (page 66).
6/22/18	Updated screen shot on page 4, added Note to step 5 on page 8, updated introductory paragraph on page 9, and updated text for step 22 on page 36.
06/13/18	Updated the View Patient Information section on pages 28 – 38 with updated screen shots throughout as well as adding information about Charge History and Records (BETA) screens.
05/23/18	Updated screen shots in the Register for ChartMaker® Mobile section on pages 13 – 14. Updated screen shots on pages 14, 17, 19, 20, and 21. Updated the View Appointment Schedules section (pages 25 -26) with updated screen shots and information regarding the new placement of # of appointments in a schedule list (step 2) and the swiping functionality when viewing appointments (step 4). Updated screen shots of pages 28 and 34. Updated the Charge section (in previous versions Charge Capture) on pages 35-48 with information and updated screen shot on the new Charge screen redesign and functionality. Updated the Rounds section, pages 49-58, with updated screen shots throughout and updated information about the swipe functionality in the Rounding List and Discharged screens, as well as the how the number of patients and displayed in the Rounding List and Discharged screen.
12/18/17	Added note with password requirements to step 2 on page 13 for when initially registering for ChartMaker Mobile.
12/12/17	Updated how to access Mobile Administration dialog on pages 7, 9, and 11.
11/08/17	Added Index and Document Change Log. Updated Contents page.
11/01/17	Added in information on adding a new patient, the Charge Copy functionality, and the Rounding feature. Also made structural changes for the new features as well as updated applicable screen shots throughout. Updated Contents page.
08/09/17	Initial Release.