

ChARM PHR Troubleshooting Document

Please read through to see if any of the tips and information below helps solve your ChARM scheduling issue.

1. What kind of appointment do I schedule if I have seen the doctor before at a different medical practice?

Each person must schedule as a **“New Patient”** for the first appointment at Happy Body Now Clinic. If you have seen the doctor previously at a different clinic, select **“New Patient - Transfer of Care”** visit type.

2. Why can't I find my ChARM account to schedule an appointment?

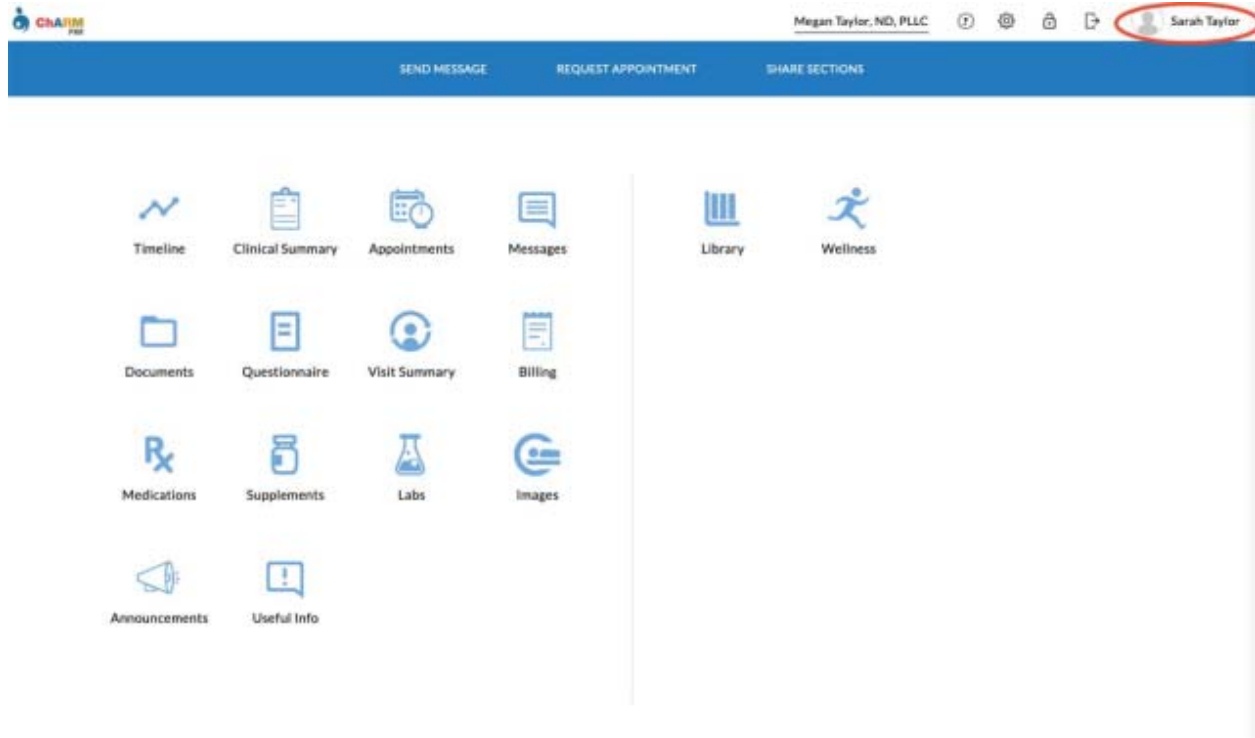
You have to first establish care with the doctor, which means setting up a new ChARM account. If you saw the doctor at a different clinic in the past you still need to set up a new account. When you go to book your appointment, simply select “No” to the question “Are you an existing patient?” in the online scheduler.

3. Whenever I click the link to set up my new ChARM account it keeps taking me to another ChARM account I have with a different practitioner. What do I do?

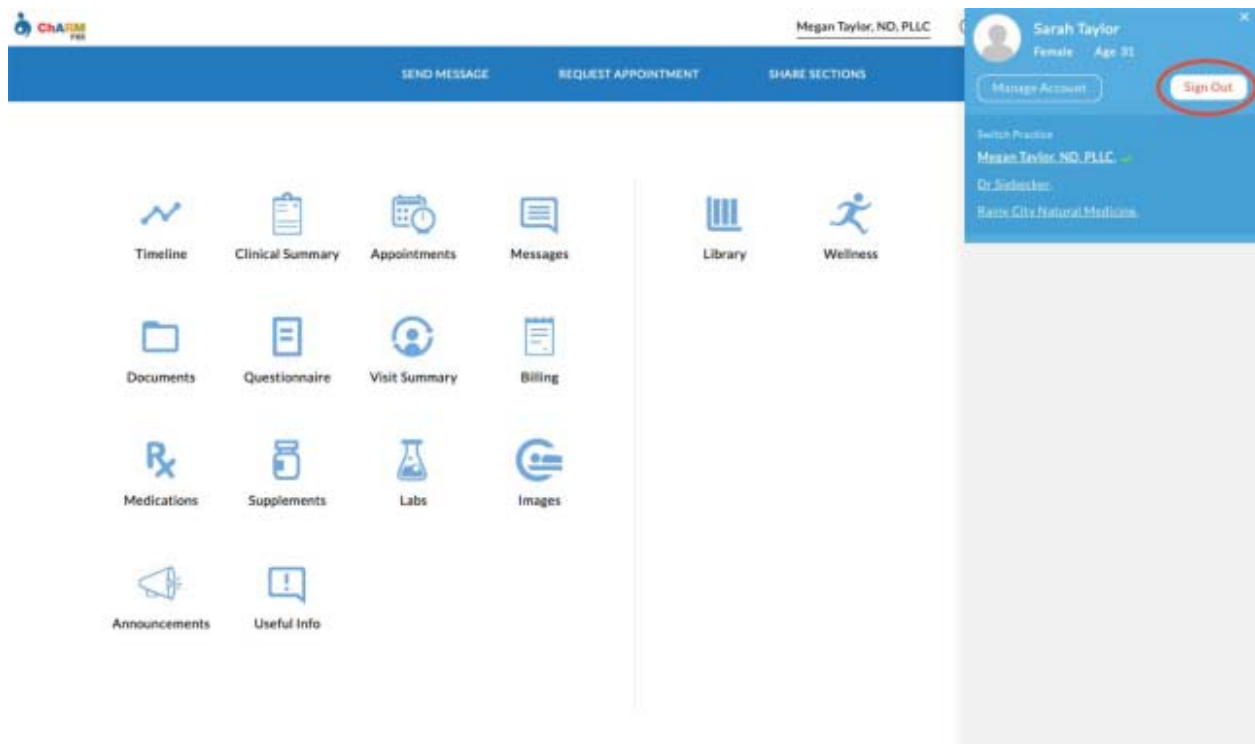
Open your ChARM PHR account through the other practice and sign out completely. Do not simply exit the window.

Follow the screenshots below in order to sign out successfully. Once you are completely logged out, please return to the email from Happy Body Now Clinic with the welcome link to set up your new account and click on it. If this doesn't work, try either 1) restarting your computer or 2) switching to a different internet browser.

A. Click on your name in the upper right hand corner.



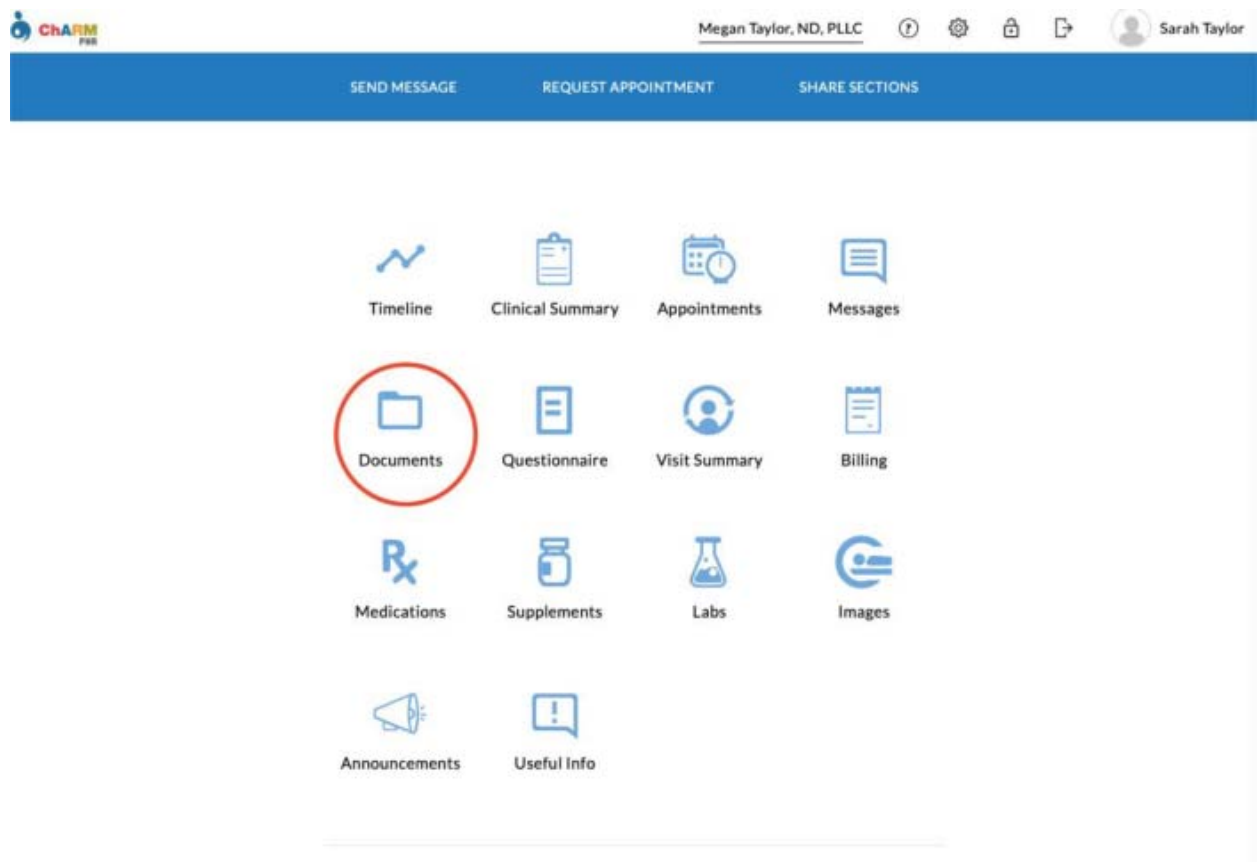
B. Select "Sign Out" from the drop down menu.



4. How do I upload documents to my ChARM Account?

Once you have received a link to set-up a ChARM Account and have done so, you can upload any document you wish. Simply select “Documents” from the Dashboard, then click “Upload”. You must follow the prompts to “share” the document so your doctor can see it. Please DO NOT upload under “Labs” as the doctor will not be able to view them. Review the screenshots below for more help.

A. Select “Documents”



B. Select “Upload”.

ChARM PMS Megan Taylor, ND, PLLC Sarah Taylor


SEND MESSAGE REQUEST APPOINTMENT SHARE SECTIONS

Timeline Clinical Summary Appointments Messages Documents Questionnaire Visit Summary Billing Medications Supplements Labs Images Library Wellness

Upload

FOLDERS

All Shared with Me Shared by Me



No Documents Available

C. Select Document to be uploaded.

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Timeline Clinical Summary Appointments Messages Documents Questionnaire Visit Summary Billing Medications Supplements Labs Images Library Wellness

Upload

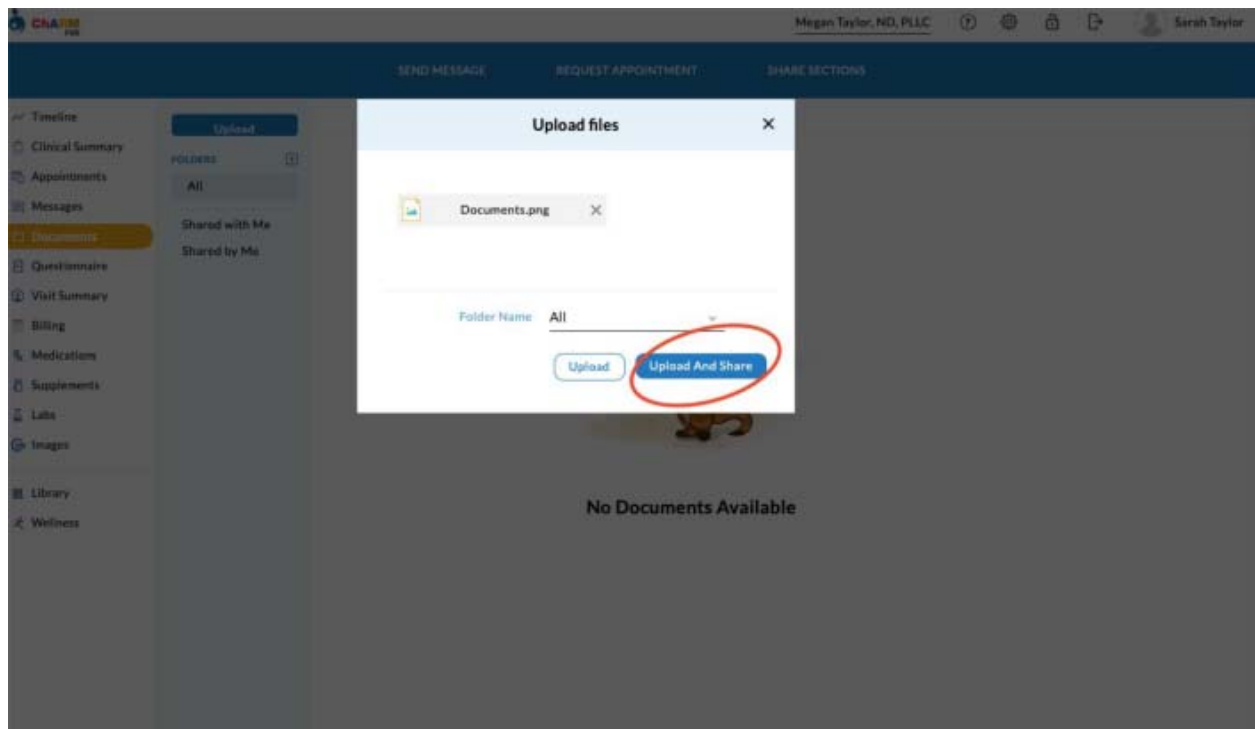
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All Shared with Me Shared by Me

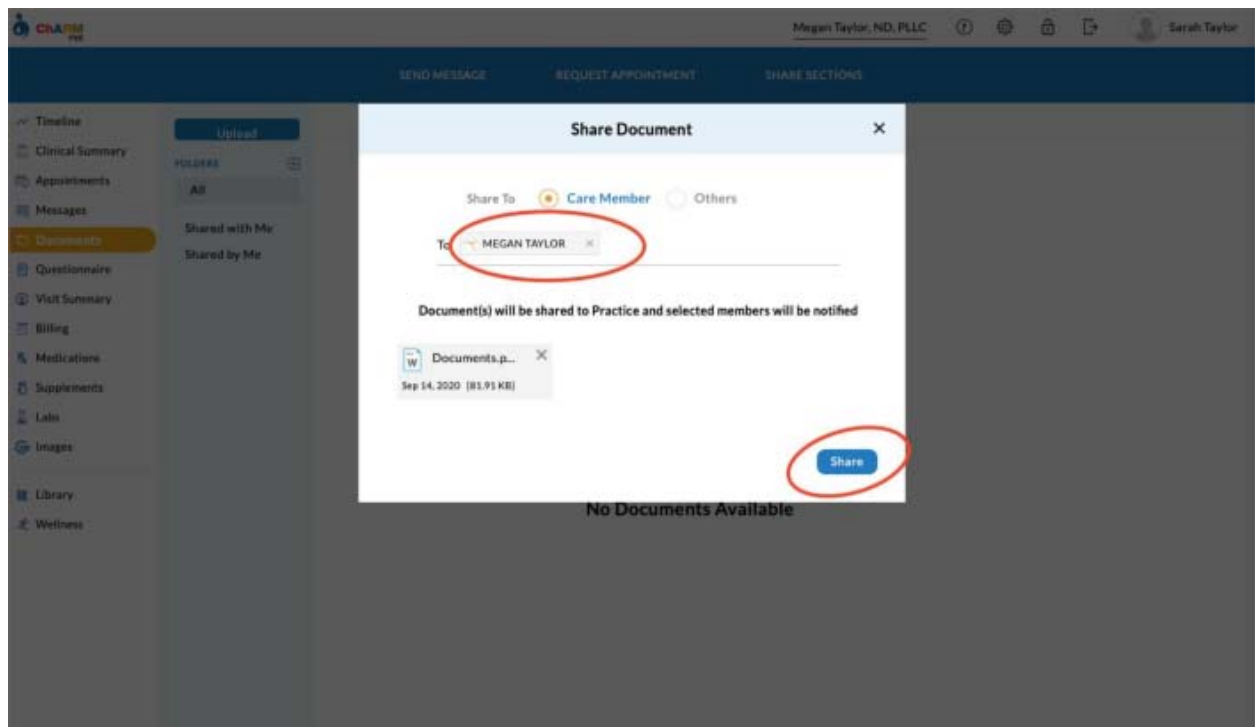


No Documents Available

D. Select Upload and Share.



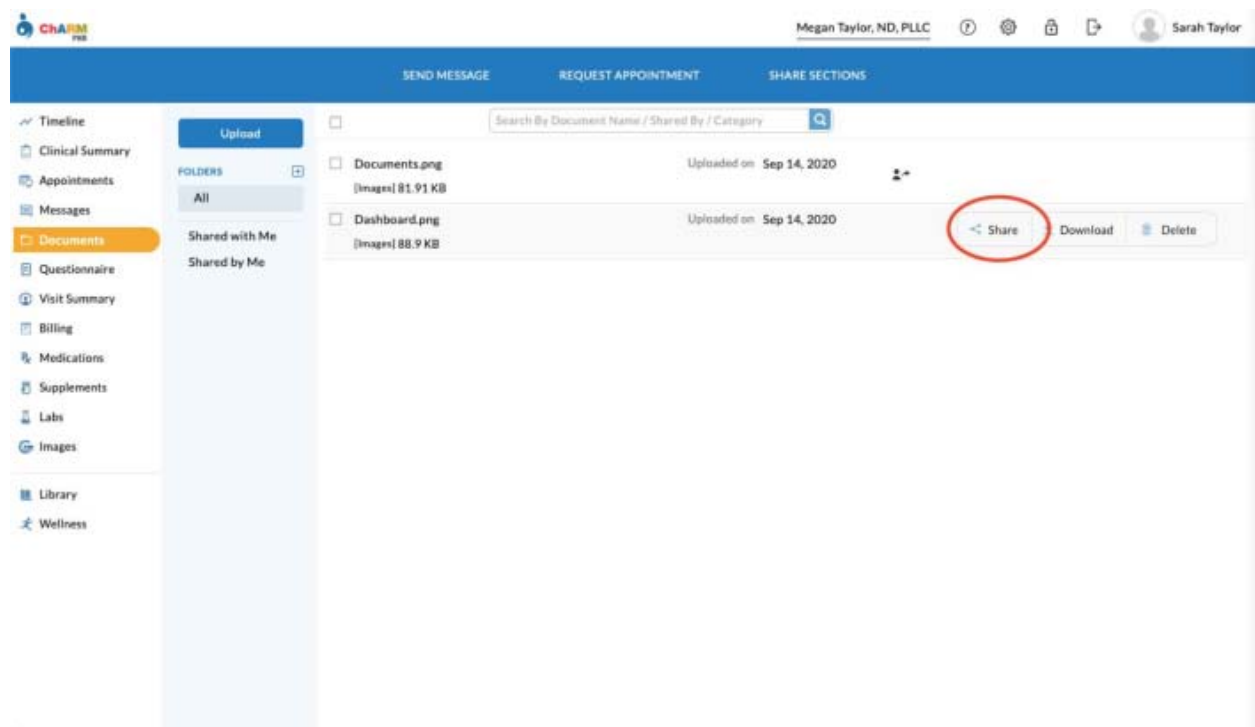
E. Select the doctor to share with and click "Share".



F. You did it!

NOTE: If you hit "Upload" instead of "Upload and Share" you must take the extra step to share the document, because that sends an alert to the doctor that the document is there to review!

Hover your cursor over the document you want to share and click the share button on the right (See screenshot below!)



*Happy Body Now Clinic acknowledges and thanks Neighborhood Naturopathic clinic for putting together and allowing us to share this ChARM PHR troubleshooting document.