



# Balance Natural Medicine

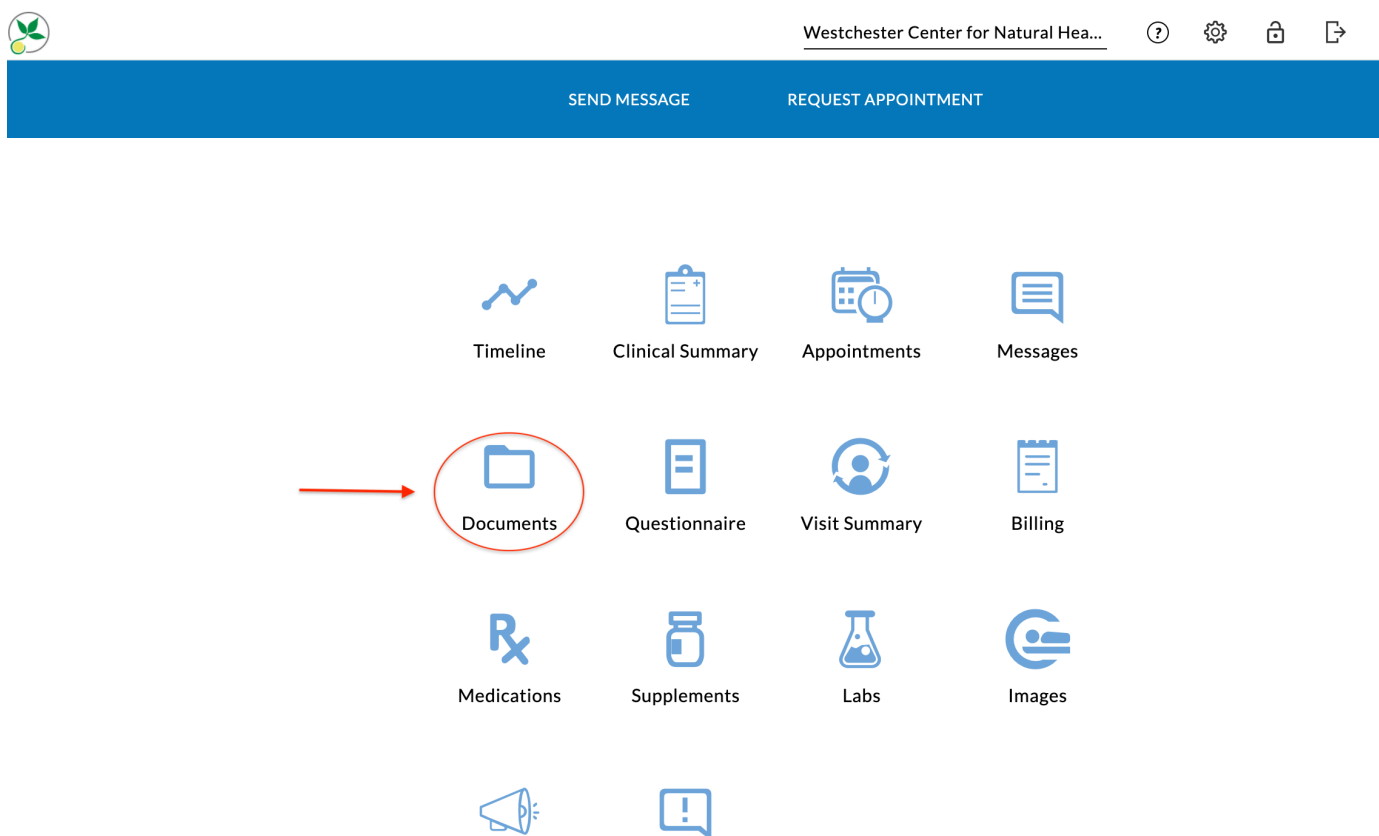
## Uploading a Document

Welcome to Balance Natural Medicine. In order to achieve the best care possible, you will occasionally be asked to upload documents into Charm, our patient portal. Examples of documents uploaded include recent lab work, pathology or imaging reports, and completed diet diaries.

If you are having difficulty uploading documents, please use this guide to assist you. If you still have questions after following the steps outlined in this guide, feel free to reach out.

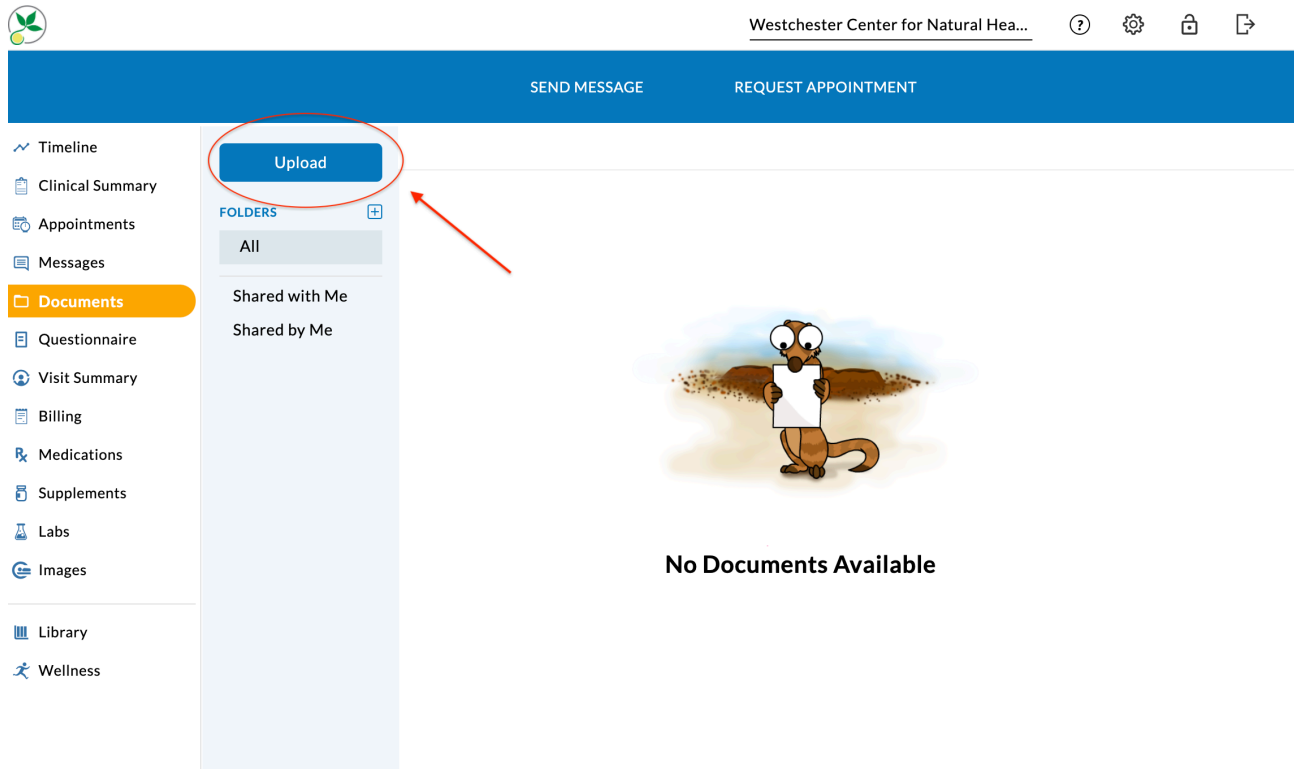
### Uploading a Document

1. Log into the patient portal using your established credentials. The portal can be accessed [here \(https://phr2.charmtracker.com/login.sas\)](https://phr2.charmtracker.com/login.sas).
2. Once you reach the main page, you will need to select “documents”:

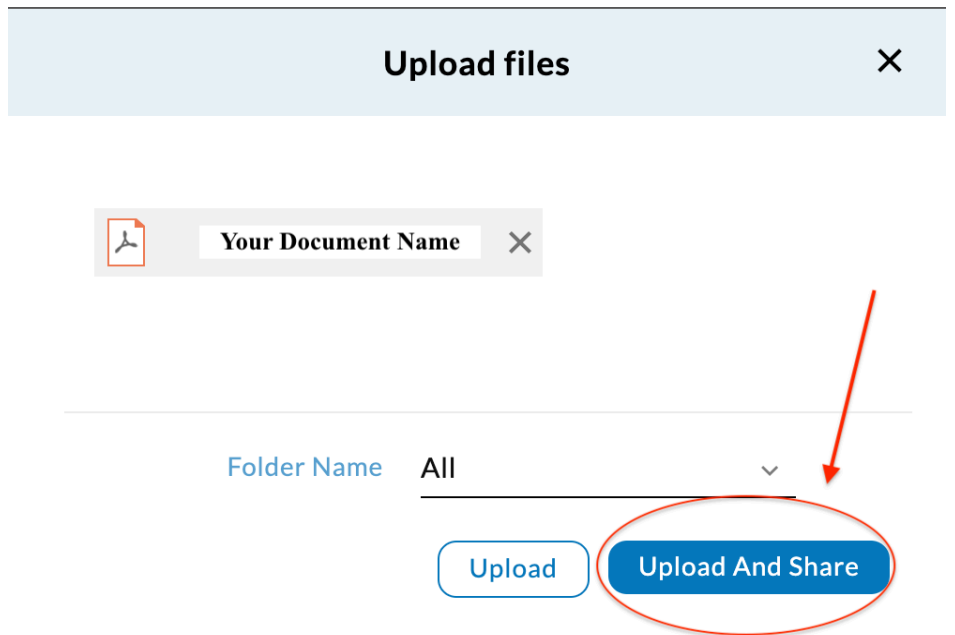




3. Then you will click upload:

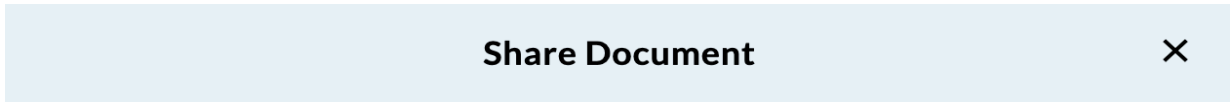


- 4. You will then select the correct document from the files on your computer. Please note that although you can upload word documents, we recommend converting all word documents into .pdf format before upload.
- 5. Once you have selected the correct document, you will need to hit “upload and share”:





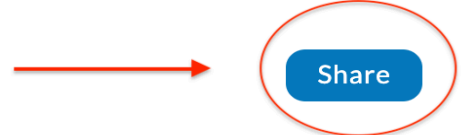
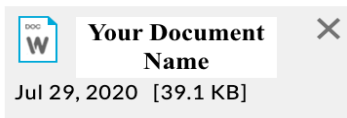
6. In the “To” section, make sure to have Dr. Egginton selected, and then select “share”:



Share To  Care Member  Others

To  ABIGAIL EGGINTO...

**Document(s) will be shared to Practice and selected members will be notified**



7. Once you have done this, your documents page should have your document listed with the shared icon, circled below:






If the document appears with the shared icon, you are all set! If not, please follow the next set of instructions.




## **Sharing an Uploaded Document**

1. Find the document you wish to share.
2. Move your cursor over the document and click the “share” button that will appear:

**Your Document Name** Uploaded on Jul 29, 2020  
[PDF] 39.1 KB

 Share  Download  Delete



3. In the “To” section, make sure to have Dr. Egginton selected, and then select “share”:

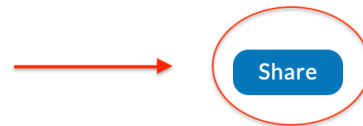
**Share Document** 

Share To  Care Member  Others

To  ABIGAIL EGGINTO... 

**Document(s) will be shared to Practice and selected members will be notified**

 **Your Document Name**   
Jul 29, 2020 [39.1 KB]



Once this is done, your document should have the “share” icon, as shown above, and you should be all set!

As always, if you have any questions regarding the contents in this guide or related to sharing your document, you can reach us by telephone or email.