



CHARTNEST REFERENCE MANUAL

ChartNest Complete App Guide

Navigation, major controls, practical workflows, reports, Plus continuity and capture, Family coordination, privacy boundaries, plans, and troubleshooting for the ChartNest iOS app.

Guide version

Version 1.1. App behavior audited July 22, 2026. Guide published July 22, 2026. Use medical.chartnest.app/help for the latest web-based guidance.

This guide helps you

Find features, understand common controls, build useful records, prepare packets, and choose the right workflow.

This guide does not do

Provide medical advice, verify clinical truth, replace source records, or promise that every feature is available on every plan or device.

All app images use fictional sample information. Review important details against original documents and qualified professionals before relying on them.

[GUIDE MAP](#)

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Use the chapter list to jump directly to a feature or task in PDF viewers that support document outlines.

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01 | BEFORE YOU BEGIN

Start with one useful care profile.

ChartNest becomes useful when ordinary care details belong to the right person and can be reviewed before a visit, call, handoff, or follow-up.

The six-step minimal setup

- 1 Create one care profile with the basic information you know now.
- 2 Add one emergency contact and the most relevant care-team contact.
- 3 Add current medications and important allergy or medical-history context from trusted sources.
- 4 Add the next appointment, its purpose, and the questions you do not want to forget.
- 5 Add one important document that you are likely to need again.
- 6 Preview Patient Summary and correct anything that needs attention.

A small setup is enough

You do not need to complete every field or use every tool. Add detail when it supports a real decision, task, conversation, or handoff.

Three rules that keep records useful

- Keep uncertainty visible. Use review labels and source notes instead of guessing.
- Correct the underlying record before rebuilding a packet or report.
- Share only the selected information needed by the intended recipient.

02 | NAVIGATION

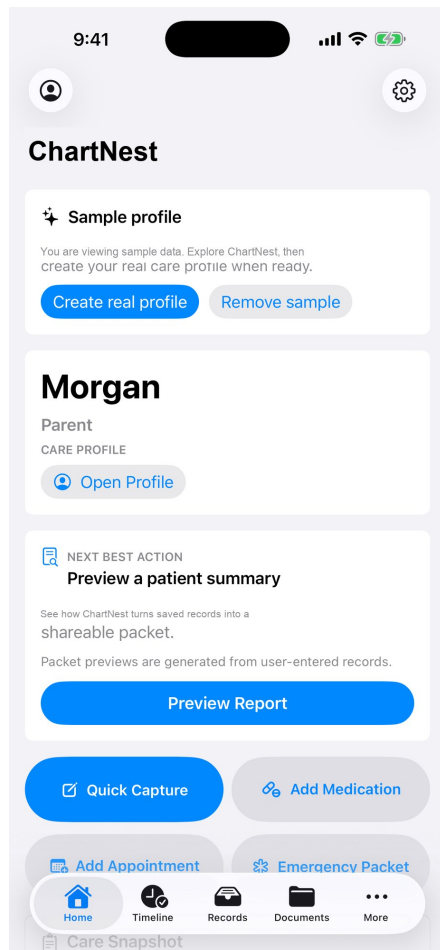
Seven destinations organize the app.

The first four destinations appear in the main tab bar. On iPhone, Care Loops, Reports, and Settings live inside More when space is limited.

Destination	Use it for	Common next action
Home	Current priorities, setup guidance, upcoming care, tasks, and important documents.	Open the next best action or a quick action.
Timeline	A newest-first chronology assembled from dated saved records.	Filter, open an event, or correct its source record.
Records	Core records, focused workflows, source review, and the broader toolkit.	Choose a record category or task-specific tool.
Documents	Importing, photographing, classifying, previewing, and tracking local files.	Add to Vault or open Document Inbox.
More > Care Loops	Questions and follow-ups that must remain visible through waiting or repeated checking.	Create, update, pause, resolve, or cancel a loop.
More > Reports	Patient, visit, emergency, handoff, medication, discharge, and administrative outputs.	Preview, share text, or export PDF when available.
More > Settings	Plans, privacy, reminders, backup, exports, purchases, deletion, and app information.	Review access, restore purchases, back up, or export.

Profile context matters

Confirm the active care profile before adding or reviewing records. Most content is organized around the selected person.



Fictional sample data. Current-release iOS capture from July 13, 2026.

03 | HOME

Use Home as the command center.

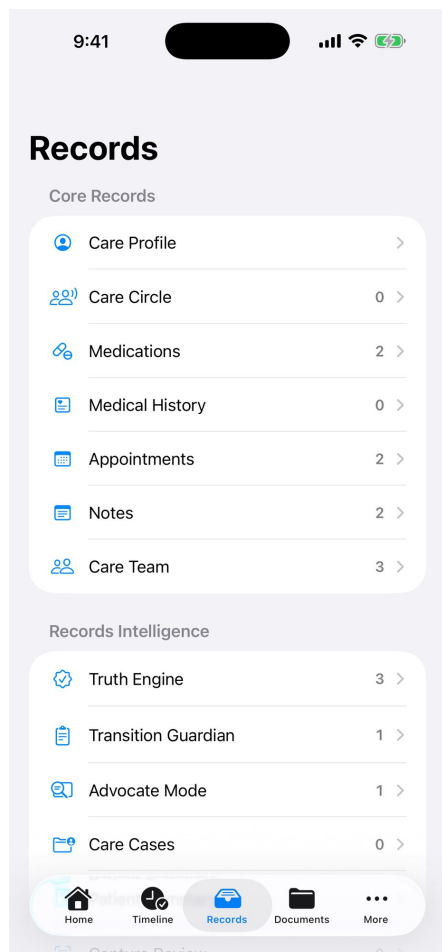
Home brings current priorities into one place so you can act without opening every record category.

KEY CONTROLS

- Profile selector: confirm or change the active care profile.
- Quick Actions: jump to common add, capture, document, and preparation flows.
- Next Best Action: open the most useful suggested organizational step.
- Care Snapshot and readiness: see what exists and what may need attention.
- Upcoming, tasks, changes, and critical documents: open the source item directly.

PRACTICAL TIPS

- Treat readiness as guidance, not a completeness certificate.
- Use Home to find work; edit the source record to correct it.
- Pin or mark only information appropriate for quick visibility.



Fictional sample data. Current-release iOS capture from July 13, 2026.

04 | RECORDS HUB

Choose the tool that matches the work.

Records is both a library of saved information and a launcher for focused workflows such as review, forms, cases, transitions, and care preparation.

KEY CONTROLS

- Core records: profile, medications, appointments, notes, tasks, care team, history, labs, and vitals.
- Focused workflows: Care Cases, Advocate Mode, Transition Guardian, and intake or emergency preparation.
- Review tools: Truth Engine, Capture Review, discrepancy review, and record quality.
- Output tools: reports, forms, packets, QR, and export-related entry points.

PRACTICAL TIPS

- Open a record category when one fact needs work.
- Open a focused workflow when several records belong to one concern or event.
- Open a report only after its source records are current enough for the purpose.

05 | CARE PROFILE AND CORE RECORDS

The care profile is the shared foundation.

Every saved item belongs to a care profile. Begin with the facts that help identify the person and support the next care moment; add optional details only when useful.

Area	What it can hold	Use it carefully
Profile	Name, birth date, contact basics, insurance context, preferences, pharmacy, and identifiers.	Avoid filling unknown details with guesses.
Medications	Name, strength, form, schedule, reason, prescriber, dates, notes, and review status.	ChartNest does not check interactions or prescribe.
Appointments	Purpose, clinician, location, questions, reminders, documents, and outcomes.	Record instructions as information to verify.
Notes	Observations, calls, questions, family updates, instructions, and events.	Use a task or loop when action must remain visible.
Tasks	One concrete action, owner, due date, reminder, status, and context.	A reminder depends on permission and device delivery.
Care team	Clinicians, pharmacy, insurance, family, emergency, and other practical contacts.	Mark a primary contact only when appropriate.
History, labs, vitals	Conditions, procedures, allergies, results, observations, dates, units, and sources.	The app organizes trends; it does not interpret them clinically.

Common record controls

Control	What it usually does	Before you finish
Add	Starts a new record for the active profile.	Confirm profile and source.
Edit	Changes an existing saved record.	Check dates, units, status, and notes.
Save	Stores the current form values locally.	Resolve obvious omissions without inventing facts.
Delete	Removes the selected item after confirmation.	Consider whether another record or packet depends on it.
Needs Review	Keeps an uncertain or incomplete organizational detail visible.	Compare with a trusted source or professional.

06 | MEDICATIONS AND APPOINTMENTS

Prepare with records, not memory alone.

Medication and appointment records are most useful when they preserve source context, current questions, and what still needs confirmation.

Medication workflow

- 1 Open Records > Medications and choose Add.
- 2 Enter what the trusted label, list, document, or professional source says.
- 3 Use notes and review status for uncertainty, changes, and questions.
- 4 Retire or update old context deliberately rather than silently overwriting history.
- 5 Preview Medication Review before a conversation and compare it with current sources.

Appointment workflow

- 1 Add the appointment with its purpose, clinician, location, and date.
- 2 Write the questions and concerns you want available during the conversation.
- 3 Attach or identify the documents that matter for preparation.
- 4 Open Prepare for Visit and review medications, recent changes, questions, and documents.
- 5 Afterward, capture an outcome note and create tasks or loops for unresolved work.

Medication safety

ChartNest can organize a caregiver-maintained medication context. It does not determine whether a medication is correct, check interactions, or provide dosing advice.

9:41

Visit Prep

Appointment

Visit
Primary care follow-up

Clinician
Dr. Avery Patel

Specialty
Internal Medicine

Location
Example General Clinic - 123 Sample Ave

Jul 20, 2026 at 9:41AM

Reason
Review sample medication list and recent questions.

Bring / Confirm

- ✓ Medication list
- ✓ Emergency contact
- ✓ Medical history
- ✓ Questions to ask
- ✓ Important documents

Fictional sample data. Current-release iOS capture from July 13, 2026.

07 | VISIT PREPARATION

Walk into the next visit prepared.

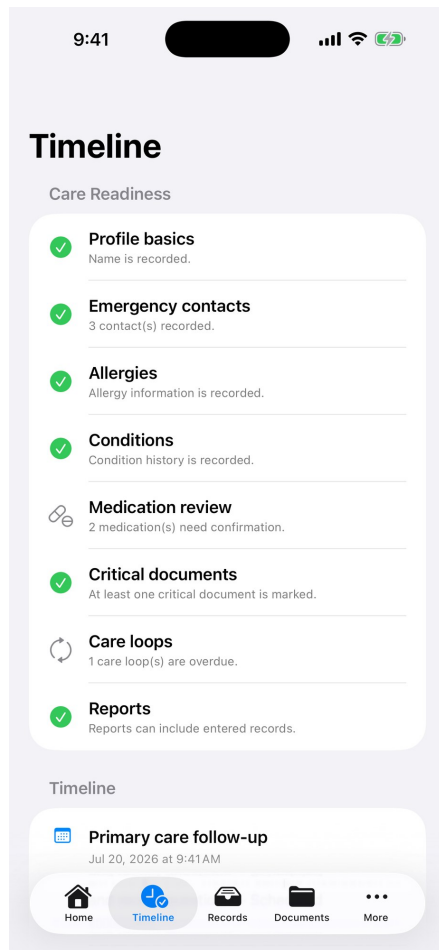
Visit Prep assembles appointment context, questions, current records, documents, and follow-up planning into one review surface.

KEY CONTROLS

- Appointment selector: choose the visit you are preparing for.
- Questions and agenda: keep the highest-priority topics visible.
- Medication and recent-change context: review before the visit.
- Documents: identify the files or records that belong in the conversation.
- Preview or report action: review the prepared visit output.

PRACTICAL TIPS

- Choose the top two or three questions when time may be limited.
- Write down names, reference numbers, and next steps after the visit.
- Turn unresolved follow-up into a task or care loop before it disappears into notes.



Fictional sample data. Current-release iOS capture from July 13, 2026.

08 | TIMELINE

See what happened and when.

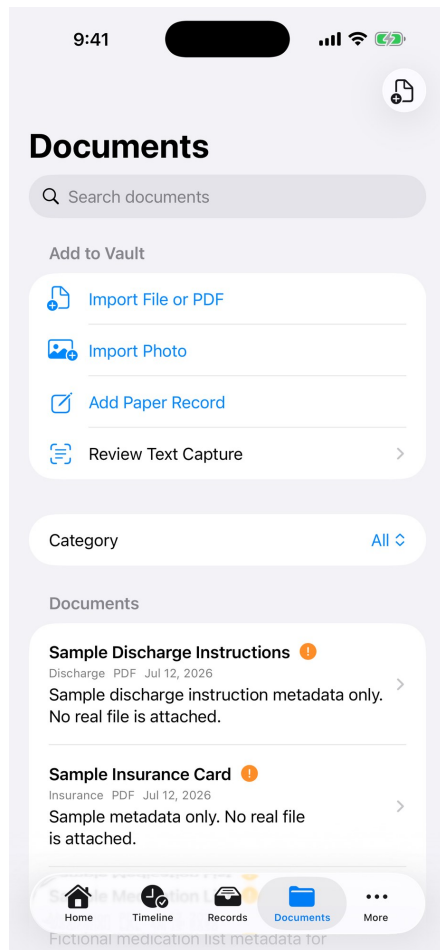
Timeline assembles dated activity from several record types into a newest-first chronology for the active care profile.

KEY CONTROLS

- Profile selector: change whose chronology is visible.
- Filters: narrow the view by record type or relevance when available.
- Timeline row: open the source record behind an event.
- Important markers: identify items that were pinned, changed, or need attention.

PRACTICAL TIPS

- An empty timeline usually means there are no dated records for the selected profile.
- Correct the underlying appointment, note, task, document, loop, lab, or vital rather than editing a timeline summary.
- Use chronology to prepare for calls and handoffs, not as an official clinical record.



Fictional sample data. Current-release iOS capture from July 13, 2026.

09 | DOCUMENTS

Keep source material findable.

Documents can organize imported files, scanned pages, photos, categories, source notes, dates, reminders, and local previews around the active profile.

KEY CONTROLS

- Add to Vault: import a supported file, scan a page, or choose a photo.
- Category and metadata: describe what the document is and when it matters.
- Preview: open the locally available file when it remains accessible.
- Document Inbox and index: review, classify, and find saved material.
- Reminder: create a local alert for an expiration or follow-up date.

PRACTICAL TIPS

- Keep the original source outside ChartNest when it must be preserved independently.
- Use clear titles such as document type plus date instead of vague names.
- Confirm a file is still available before relying on a future packet or handoff.

Important boundary

Private iCloud backup stores supported record data and document metadata, not attached document file bytes. Preserve important originals separately.

10 | NOTES, TASKS, REMINDERS, AND CARE LOOPS

Choose the container that matches the work.

A note remembers, a task assigns one action, and a care loop keeps an unresolved issue visible through waiting, repeated checking, or several steps.

Tool	Best for	Example	Typical finish
Note	Information to remember.	A call summary or observation.	Saved as context.
Task	One concrete action.	Call the clinic by Friday.	Completed or canceled.
Care Loop	An issue that stays open through waiting or several follow-ups.	Referral pending across calls and paperwork.	Resolved or deliberately canceled.
Reminder	A local prompt tied to a date.	Document renewal or appointment prep.	Delivered by iOS when permission and timing allow.

Care Loop controls

- Status separates open, waiting, paused, resolved, and canceled work.
- Priority helps order practical attention; it is not medical triage.
- Due date, owner, contacts, documents, and notes keep the next check visible.
- Progress updates preserve the story without pretending the issue is settled.

Reminder delivery

Local reminders need notification permission and a future date. Device Focus settings, notification settings, edits, deletions, and normal iOS delivery behavior can affect whether an alert appears.

11 | REPORTS AND PACKETS

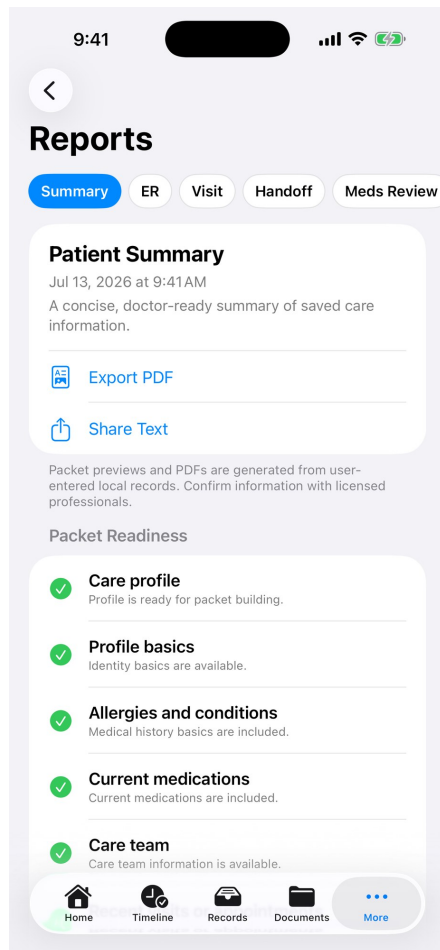
Turn saved records into a focused output.

Reports are assembled from saved, user-entered information. Choose the output that matches the moment, review it, then share only what belongs with the recipient.

Output	Purpose	Useful before or after
Patient Summary	A broad, readable view of profile and care records.	A caregiver needs the overall picture.
Emergency / ER Packet	Selected emergency contacts, conditions, allergies, medications, and practical context.	Emergency preparation or intake.
Doctor Visit	Questions, recent changes, medications, documents, and follow-up context.	A visit, call, or second-opinion conversation.
Family Handoff	Selected logistics, contacts, tasks, preferences, and current context.	Another trusted helper takes on work.
Medication Review	Caregiver-maintained medication context and review questions.	Medication lists, labels, or changes need organized review.
Discharge Follow-Up	Appointments, calls, tasks, documents, and verification questions.	After discharge, emergency care, or a major instruction.
Insurance/Admin	Organizations, references, documents, deadlines, and questions.	An administrative call, appeal, or form process.

Preview, Share Text, and Export PDF

- Preview shows the assembled output before it leaves the app.
- Share Text creates a selectable text version for the iOS share sheet.
- Export PDF creates a formatted file when the current plan includes PDF output.
- Packet Readiness points to possible omissions; it does not certify completeness.



Fictional sample data. Current-release iOS capture from July 13, 2026.

12 | PATIENT SUMMARY

Review the broad care picture.

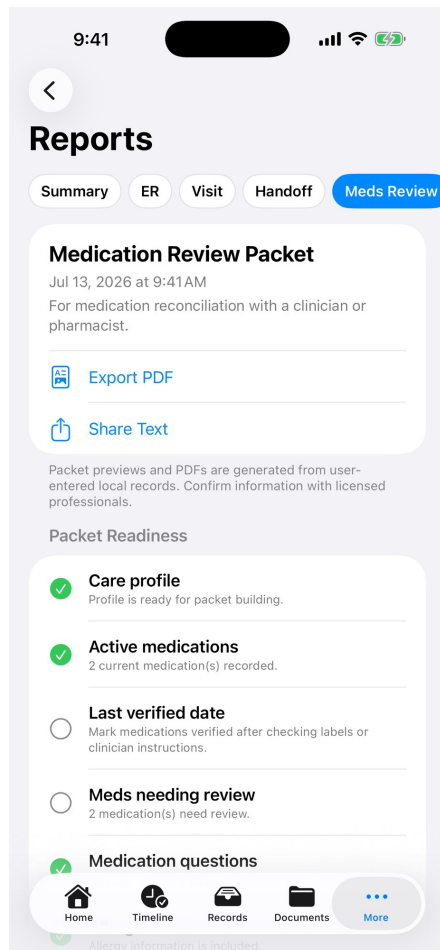
Patient Summary gathers selected profile and record information into a readable overview for personal review and intentional sharing.

KEY CONTROLS

- Preview sections: inspect identity, contacts, medications, history, appointments, and other included records.
- Readiness or review cues: return to source records when information is missing or stale.
- Share Text or Export PDF: choose an output only after reviewing the contents.

PRACTICAL TIPS

- Update the original record rather than editing around an incorrect report.
- Remove or avoid sharing sections that are unnecessary for the recipient.
- Treat the packet as caregiver-organized context, not a replacement for official records.



Fictional sample data. Current-release iOS capture from July 13, 2026.

13 | MEDICATION REVIEW

Prepare medication context for human review.

Medication Review makes names, schedules, sources, questions, and possible changes easier to compare before speaking with a pharmacist or clinician.

KEY CONTROLS

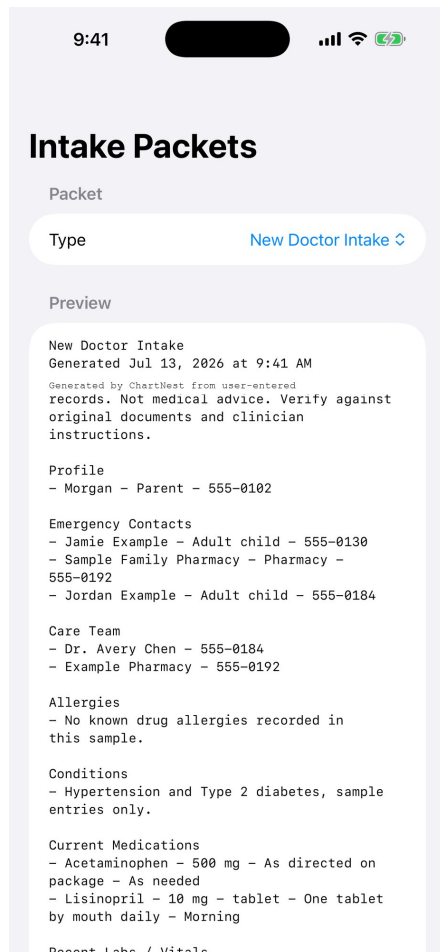
- Medication list: inspect current caregiver-maintained entries.
- Review flags and questions: keep uncertain or conflicting details visible.
- Source context: identify the label, list, document, or person behind an entry.
- Share or export: prepare the reviewed output for the intended conversation.

PRACTICAL TIPS

- Bring the source label or official list when possible.
- Ask a professional when two sources disagree instead of choosing the more convenient answer.
- Use plain review language; do not present ChartNest as having validated the regimen.

Important boundary

Medication Review organizes information. It does not check interactions, recommend changes, or establish the correct dose or schedule.



Fictional sample data. Current-release iOS capture from July 13, 2026.

14 | EMERGENCY AND INTAKE

Prepare selected emergency context carefully.

Emergency and intake outputs can gather time-sensitive contacts, allergies, medications, conditions, practical details, documents, and questions into a focused packet.

KEY CONTROLS

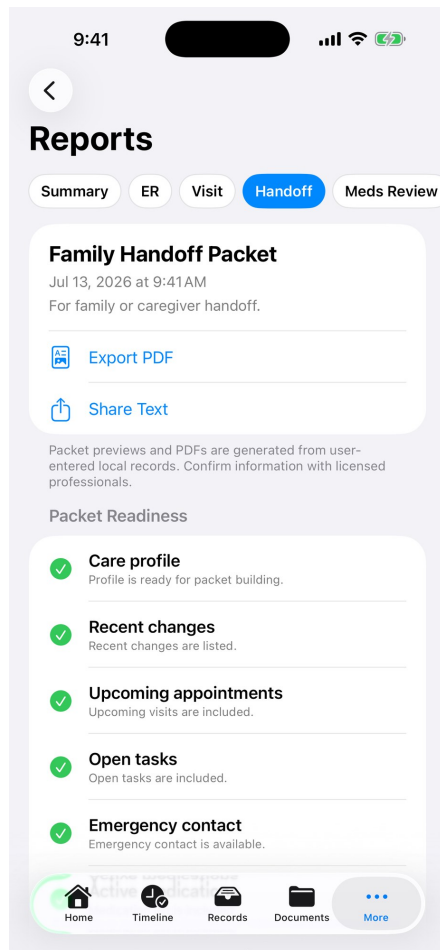
- Packet type: choose emergency, intake, or another purpose-specific output.
- Readiness review: identify missing or stale source records.
- Preview: inspect every section before exporting or sharing.
- Emergency QR when available: create a compact payload for user-chosen visibility.

PRACTICAL TIPS

- Keep emergency-visible information narrow and current.
- Anyone who can scan a shared QR may be able to read its payload.
- Use emergency services and qualified professionals for urgent needs.

Important boundary

ChartNest does not monitor emergencies, detect symptoms, triage, or contact emergency services.



Fictional sample data. Current-release iOS capture from July 13, 2026.

15 | CAREGIVER HANDOFF

Share enough context, not the whole archive.

A handoff packet can help another trusted helper understand practical responsibilities, contacts, tasks, preferences, and selected current context.

KEY CONTROLS

- Handoff purpose or window: define what the helper is taking on and for how long.
- Selected records: include only what the role requires.
- Tasks and open work: name owners, due dates, and unresolved loops.
- Preview and share: check recipient, contents, and delivery method.

PRACTICAL TIPS

- Write down who owns each responsibility after the handoff.
- Avoid sending unrelated clinical or personal detail.
- Update the handoff when dates, contacts, medications, or responsibilities change.

16 | FOCUSED WORKFLOWS

Group records around a real concern or transition.

Care Cases, Advocate Mode, and Transition Guardian sit above individual records. They help bring several related facts, tasks, questions, and outputs together without replacing the source records.

Workflow	Use it when	What it organizes	Typical output
Care Case	Several records belong to one concern, goal, or administrative matter.	Status, priority, linked records, notes, tasks, documents, and timeline context.	Case Brief.
Advocate Mode	A visit, meeting, or call needs a goal, questions, results, and next steps.	Before, during, and after context for the interaction.	Visit, call, or advocacy brief.
Transition Guardian	Discharge, emergency care, a procedure, medication change, testing, or another time-bound transition creates follow-up work.	What happened, copied instructions, questions, tasks, appointments, documents, and warning signs from sources.	Transition brief or 30-Day Plan.

Use the source records as the foundation

- Link the relevant medication, appointment, note, task, loop, document, or contact instead of rewriting it differently in every workflow.
- Use status and priority to organize practical work; neither is a clinical assessment.
- Review generated briefs and update the underlying records when something is wrong.
- Transition warning signs should be copied from source instructions and kept attributable, not invented by the app.

9:41

Post-discharge follow-up plan

Hospital Discharge

Status
Active

Priority
Marked Important

Transition date
Jul 12, 2026

Target through
Jul 27, 2026

Facility
Example General Hospital

Clinician/team
Dr. Avery Chen

Marked Important is a caregiver priority label only.
ChartNest does not triage emergencies or recommend treatment.

What changed

Reason
Fictional discharge follow-up workflow for website screenshots.

Summary
Organize discharge papers, verify medication changes, schedule follow-up, and keep

Fictional sample data. Current-release iOS capture from July 13, 2026.

17 | TRANSITION GUARDIAN

Turn a care change into visible follow-up.

Transition Guardian collects documents, appointments, tasks, questions, contacts, and source-based instructions around a time-bound change in care.

KEY CONTROLS

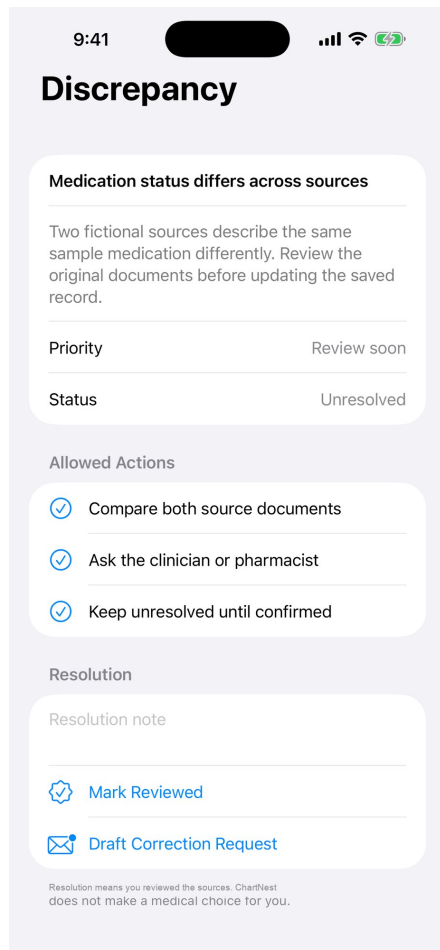
- Transition type, status, and priority: organize the event and practical urgency.
- What happened: capture the event in the user's own words.
- Instructions and warning signs: copy source language and keep its origin visible.
- Tasks, loops, appointments, and documents: connect the follow-up work.
- 30-Day Plan or brief: preview the selected transition output.

PRACTICAL TIPS

- Separate clear instructions from questions needing professional confirmation.
- Assign an owner and date to calls, pickups, referrals, forms, and tests.
- Close the transition only when the practical work is resolved or deliberately ended.

Important boundary

Transition Guardian is an organization workflow. It does not create clinical warning signs or decide when someone needs emergency care.



9:41

Discrepancy

Medication status differs across sources

Two fictional sources describe the same sample medication differently. Review the original documents before updating the saved record.

Priority	Review soon
Status	Unresolved

Allowed Actions

- ✓ Compare both source documents
- ✓ Ask the clinician or pharmacist
- ✓ Keep unresolved until confirmed

Resolution

Resolution note

☒ Mark Reviewed
 ☐ Draft Correction Request

Resolution means you reviewed the sources. ChartNest does not make a medical choice for you.

Fictional sample data. Current-release iOS capture from July 13, 2026.

18 | TRUTH ENGINE

Review source-backed candidate facts.

Truth Engine can recognize possible information in imported source material, preserve evidence context, and place candidates into a review flow before they affect organizational records.

KEY CONTROLS

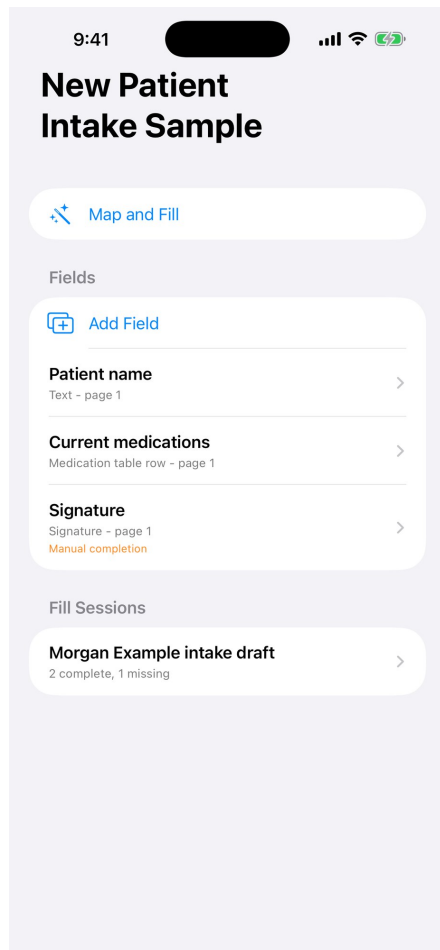
- Add source: import or scan supported material for review.
- Candidate fact: inspect the suggested category, value, source page, and evidence context.
- Accept, edit, reject, or leave unresolved: record a human review decision.
- Review Queue and Discrepancy Radar: compare uncertain or differing values.
- Reviewed Snapshot or correction draft: create a review-oriented output.

PRACTICAL TIPS

- Read the source passage, not only the extracted value.
- Leave uncertainty unresolved when the evidence does not support a confident choice.
- Ask a professional or source owner about important conflicts.

Important boundary

Recognized information is a candidate, not medical truth. Reviewed means reviewed by the user, not verified by ChartNest or a clinician.



9:41

New Patient Intake Sample

Map and Fill

Fields

Add Field

Patient name
Text - page 1

Current medications
Medication table row - page 1

Signature
Signature - page 1
Manual completion

Fill Sessions

Morgan Example intake draft
2 complete, 1 missing

Fictional sample data. Current-release iOS capture from July 13, 2026.

19 | FORM AUTOPILOT

Reuse reviewed information with manual control.

Form Autopilot can detect fields, map reviewed saved values, and prepare a flattened PDF while keeping signatures, attestations, consent, submission, and final checking with the user.

KEY CONTROLS

- Import form: choose a supported source file.
- Detected fields: inspect labels, types, and placement.
- Map value: connect a reviewed profile or record value to a field.
- Edit or clear: correct a label, geometry, or mapped value.
- Review confirmation and Export PDF: confirm the manual review before generating output.

PRACTICAL TIPS

- Inspect names, dates, units, checkboxes, and multiline text carefully.
- Complete signatures, initials, consent, and attestations yourself.
- Review the entire flattened PDF before sending or submitting it through the appropriate channel.

Important boundary

ChartNest does not guarantee compatibility with every PDF and does not submit forms for the user.

20 | CAPTURE AND RECORD INTELLIGENCE

Use suggestions as a starting point for review.

Capture Review, Ask My Records, Record Quality, Health Index, and source-oriented tools help find, compare, or organize saved information without replacing human judgment.

Tool	What it helps with	Boundary
Capture Review	Reviews possible medications, appointments, contacts, tasks, notes, or other candidate records from supported capture flows.	Nothing should silently become a trusted record.
Ask My Records	Answers organization questions from saved ChartNest records and labels source context.	It should refuse diagnosis, treatment, prescribing, interaction, and emergency questions.
Record Quality	Highlights possible gaps, stale context, or review work across saved records.	Quality guidance is not certification.
Health Index	Provides an organized entry point to past visits, referrals, care plans, insurance items, sources, and audit context.	It is not a provider portal or official longitudinal record.
Import Review Queue	Keeps imported candidates visible until accepted, edited, rejected, or left unresolved.	Source review remains the user's responsibility.
Audit Vault	Preserves review and provenance context for supported workflows.	It does not establish clinical truth.

Good question shape

Ask organizational questions such as "What appointments are next?" or "Which saved medications still need review?"
Use qualified professionals for clinical interpretation and urgent decisions.

21 | SETTINGS, PRIVACY, BACKUP, AND EXPORT

Know when information stays local and when it leaves.

Ordinary records are local-first. Information leaves through explicit backup, export, sharing, QR, or configured collaboration actions chosen by the user.

Action	What it does	Important limitation
Private iCloud backup	Creates a user-initiated snapshot of supported record data and document metadata for eligible plans.	Attached document file bytes are not included.
Restore Purchases	Asks Apple to restore recognized entitlements for the Apple account used for purchase.	Pro and annual subscriptions are separate products.
Export Local Data	Creates a local JSON export of supported app data.	The current app does not provide a user-facing JSON import or restore flow.
Export Health Bundle	Creates a structured, FHIR-inspired bundle for supported records.	It is not certified FHIR interoperability and must be reviewed.
Share Text / PDF	Hands selected content to the iOS share sheet.	The user chooses the recipient and delivery method.
Delete All Local Data	Removes local ChartNest data after confirmation.	Review backups, exports, and locally stored originals first.

Four storage and sharing zones

- On this device: profiles, records, local documents, and supported on-device processing.
- Private iCloud backup: an optional snapshot with the document-file limitation above.
- Shared iCloud collaboration: selected, permissioned Family content when enabled.
- User-chosen exports and shares: text, PDF, JSON, Health Bundle, or QR through explicit actions.

22 | PLANS AND FEATURE AVAILABILITY

Plan access and device capability both matter.

A plan can unlock a workflow while device permissions, iCloud status, App Store entitlement, operating-system support, service availability, and release configuration still determine whether it works now.

Level	General role	Typical access pattern
Free	Start a care profile and use core organization with practical creation limits.	Existing items remain usable when a creation limit is reached.
Pro Lifetime	Permanent local ownership through a one-time purchase.	Unlimited local creation, PDF packets and reports, local export, Health Bundle, and core review outputs.
Plus Annual	Protection, continuity, capture, search, preparation, and advanced personal organization while active.	Includes Pro plus optional iCloud backup, continuity, recovery, document search, Smart Capture, source-cited answers, reviews, and personal administration.
Family Annual	Private multi-person care coordination while active.	Includes Plus plus Care Circles, roles and permissions, shared work, handoffs, household coordination, guests, approvals, and shared administration.

Care Circle when enabled

Care Circle supports permissioned sharing of selected updates, packets, attachments, tasks, shifts, and proposals. Current code represents up to 3 owner-managed circles, 8 participants per circle, 1 active temporary handoff per circle, 9 predefined assignable roles, and shared attachments up to 20 MB. Availability still depends on the current released app, Family entitlement, Apple iCloud and CloudKit services, invitations, and permissions, so the controls visible in the installed app are the source of truth.

Subscription clarity

Pro Lifetime is USD \$24.99 one time. Plus Annual is USD \$39.99/year and Family Annual is USD \$69.99/year while active. Pro does not automatically credit an annual subscription. U.S. pricing shown. Local App Store pricing may vary.

23 | WORKFLOW RECIPES

Prepare for a visit or handle a discharge.

These recipes combine records and focused tools around common care moments. Adjust them to the situation and professional guidance.

Prepare for a first doctor visit

- 1 Open or create the care profile and add the most relevant contacts.
- 2 Add known allergies, conditions, procedures, and current medications from trusted sources.
- 3 Add the appointment with purpose, clinician, location, and questions.
- 4 Import the relevant documents and confirm they preview correctly.
- 5 Open Visit Prep and preview the Doctor Visit packet.
- 6 After the visit, capture an outcome note and turn unresolved work into tasks or loops.

Handle a hospital discharge

- 1 Import or scan discharge papers into Documents or Truth Engine.
- 2 Review candidate facts before accepting them into records.
- 3 Create a Transition Guardian plan and record what happened.
- 4 Copy source instructions and warning signs without turning them into app advice.
- 5 Add follow-up appointments, calls, tasks, loops, documents, and medication questions.
- 6 Preview the Discharge Follow-Up packet or 30-Day Plan before sharing.

24 | WORKFLOW RECIPES

Reconcile a list or prepare an insurance call.

The goal is not to force certainty. It is to keep evidence, questions, ownership, and next steps visible until the right person can resolve them.

Reconcile conflicting medication lists

- 1 Add each trusted source to Truth Engine or the relevant review flow.
- 2 Open Review Queue or Discrepancy Radar and compare the source passages.
- 3 Accept, edit, reject, or leave candidate values unresolved.
- 4 Add a question for a pharmacist or clinician instead of guessing.
- 5 Generate Medication Reconciliation or Medication Review for the conversation.
- 6 Update the caregiver-maintained medication record only when there is an appropriate basis.

Prepare an insurance or administrative call

- 1 Save insurance basics, organization, reference number, due dates, and documents.
- 2 Create an Advocate Mode insurance or administrative session.
- 3 Write the goal and questions before calling.
- 4 Capture the representative's name, reference, and next steps in your own words.
- 5 Create tasks or loops for anything pending.
- 6 Preview an Insurance/Admin brief or packet when useful.

25 | TROUBLESHOOTING

Start with profile, access, permissions, and source records.

Most confusing states become easier to diagnose when you first confirm the active profile, the plan entitlement, the relevant permission, and whether the underlying record exists.

Problem	Check first	Then try
Cannot add another record	Plan and usage status for the category.	Edit existing items, review the plan, or restore purchases.
Purchase not recognized	Apple account and current network state.	More > Settings > Restore Purchases.
Plus backup unavailable	Plus/Family access, iCloud sign-in, iCloud Drive, storage, and network.	Review status, retry, or choose Back Up Now and read the latest summary.
Document preview missing	Whether the local file still exists and is accessible.	Re-import the source or update the document record.
Recognition missed text	Image sharpness, crop, orientation, contrast, and source format.	Re-capture, edit the candidate, or enter the value manually.
Form field is misplaced	Detected label, type, and page geometry.	Edit or clear the field, remap, and inspect the exported PDF.

26 | TROUBLESHOOTING

When a reminder, timeline, packet, or Care Circle is missing.

Treat an absent result as a clue about input, availability, or configuration. ChartNest does not invent missing records or silently bypass permissions.

Problem	Likely cause	What to do
Reminder did not fire	Permission, past date, Focus settings, an edited/deleted record, or normal system delivery.	Check notification status, date, and device settings; reschedule if appropriate.
Timeline is empty	No dated records for the selected profile or filters hide them.	Confirm profile and add/open a dated source record.
Packet is incomplete	The source records do not exist, are stale, or do not match the packet purpose.	Review readiness, correct source records, and preview again.
Care Circle cannot be created	Family access, current release, iCloud or CloudKit capability, invitation state, or permission is unavailable.	Use the collaboration controls visible in the installed app and contact support when the entitlement appears wrong.
A price will not load	App Store product metadata or network is unavailable.	Retry with a working connection and rely on the purchase surface before confirming a transaction.
Export is not what you expected	The wrong output, stale source data, or a plan boundary.	Return to source records, choose the correct report, and preview before exporting again.

Support boundary

Do not send medical records, diagnoses, medication details, patient names, or document contents through website forms or ordinary support email. Use medical.chartnest.app/support for product help.

27 | MAJOR CONTROL REFERENCE

What common labels mean.

Control names can vary slightly by screen and release. Read the confirmation text whenever a control can share, export, overwrite, restore, or delete information.

Control	Meaning	Watch for
Add / New	Start a new record, case, session, loop, packet, or source.	Active profile and plan limit.
Edit	Change an existing saved item.	Source, date, units, and review state.
Save	Store the current values.	Required fields and accidental guesses.
Cancel	Leave the current unsaved action.	Unsaved changes may be discarded.
Delete	Remove the selected item after confirmation.	Linked context and whether the action is reversible.
Archive / Close	Move completed or inactive work out of the main active view.	Whether records remain available elsewhere.
Mark Reviewed	Record that the user reviewed a value or snapshot.	This is not clinician verification.
Accept / Reject	Record a decision about an imported or extracted candidate.	Read evidence before deciding.
Resolve / Reopen	Close or restore an unresolved loop, discrepancy, or follow-up.	Do not resolve merely to clear the list.

28 | OUTPUT CONTROL REFERENCE

Preview before information leaves the app.

Sharing controls are deliberate transitions. Confirm the contents, recipient, and method every time, especially when an output contains sensitive information.

Control	Meaning	Watch for
Preview	Open the assembled result without sending it.	Missing, stale, or unnecessary sections.
Share Text	Create a text representation for the iOS share sheet.	Recipient and pasted context.
Export PDF	Create a formatted PDF for review or sharing.	Plan access and the final rendered pages.
Export Local Data	Create a JSON export of supported local records.	No user-facing JSON import/restore flow.
Export Health Bundle	Create a structured, FHIR-inspired bundle.	Not certified FHIR; inspect before use.
Backup Now	Create a manual private iCloud snapshot when eligible; optional automatic backup begins only after opt-in.	Attached file bytes are not included and service timing can vary.
Restore	Replace supported local state from an eligible backup flow.	Read scope and confirmation carefully.
Create QR	Generate a compact scannable payload when available.	Anyone with the QR may read its contents.
Invite / Publish	Share selected collaboration content when Family features are available.	Role, section permissions, profile scope, expiry, recipient, and Apple service availability.

29 | PLUS CONTINUITY, RECOVERY, AND DOCUMENT TOOLS

Protect and find the information you maintain.

Plus adds optional cloud continuity and review-first document tools while preserving manual control, source context, and qualified availability language.

Capability	What it does	Important boundary
Optional iCloud backup	After opt-in, back up eligible records after meaningful changes, use Back Up Now, and review status, failures, and retries.	Timing depends on Apple services and network conditions; attached document file bytes may remain device-local.
Multi-device continuity	Keep supported information available across compatible Apple devices and reconcile offline changes.	Synchronization is not guaranteed to be instant under every condition.
Recovery history	Review, preview, and restore recent supported recovery points after an accidental change.	Recovery does not replace separately preserving important original files and exports.
Search inside documents	Use on-device Apple text recognition, full-text search, snippets, correction, and reprocessing for supported documents.	Extracted text is not medical interpretation or clinical verification.
Smart Capture	Turn supported labels, cards, notices, reports, instructions, invoices, claims, receipts, photos, PDFs, and codes into reviewable drafts.	The user confirms or corrects every draft before an authoritative record changes.

Control stays visible

The user enables optional cloud features, reviews status, chooses restore actions, checks captured details, and can keep ordinary local records without cloud backup.

30 | PLUS PREPARATION, CONNECTED DATA, AND ADMINISTRATION

Turn records into reviewed personal workflows.

Plus combines source-cited answers, structured preparation, optional connected data, administrative tools, and selected portability without turning ChartNest into a clinical service.

Capability	Use it for	Important boundary
Ask ChartNest	Ask organizational questions from authorized records and open the exact cited sources behind an answer.	It abstains when information is missing and refuses diagnosis, treatment, dosage, prognosis, and triage.
Reviews and appointment preparation	Create weekly, monthly, and appointment-focused reviews, editable packets, Visit Companion notes, and follow-up actions.	These outputs are not clinical assessments and require review.
Care Readiness	Check whether selected records are complete, stale, missing, or ready for review before a visit, trip, or emergency.	It is not a health score, medical risk score, or completeness certificate.
Optional Apple Health	Read selected supported categories with permission for personal snapshots and appointment-ready summaries.	Availability varies by device, region, support, release, and permission; no continuous monitoring.
Administration and refill planning	Organize providers, referrals, insurance, claims, expenses, communications, pharmacy details, quantities, dates, and user-entered estimates.	No coverage, reimbursement, pharmacy ordering, dosage, or provider-integration guarantee.
Import, export, travel, and privacy	Review supported FHIR R4, C-CDA, CSV, archive, or PDF data; prepare selected offline packets; and manage connected-data controls.	No formal FHIR certification, universal compatibility, emergency replacement, or medication-timing advice.

31 | FAMILY PERMISSIONS, SHARED WORK, AND HANDOFFS

Coordinate trusted people without sharing everything.

Family includes Plus and adds permission-aware collaboration across selected profiles, sections, responsibilities, updates, and care moments.

Capability	What it supports	Access boundary
Care Circles	Create private circles, invite trusted people, accept invitations, remove members, leave, or stop sharing.	Availability depends on the current release, Family entitlement, iCloud and CloudKit, invitations, and permissions.
Roles and sections	Use Owner, Organizer/Editor, or Viewer roles across selected profiles and sections.	Members see only the profiles and sections their permissions allow.
Shared tasks and activity	Assign work, dates, priorities, comments, completion, reassignment, notifications, and important shared updates.	Shared actions remain attributable and limited by access.
Care handoffs	Share selected medications, appointments, tasks, changes, contacts, and user-written instructions with acknowledgment and expiry.	A handoff is not whole-archive access or professional care direction.
Temporary and guest access	Limit a trusted helper to selected profiles, sections, tasks, shifts, role, and dates.	Access can expire or be revoked and does not create provider status or legal authority.
Ask the Circle	Ask permission-aware organizational questions across authorized shared information and open cited sources.	Answers remain limited by permissions and do not provide medical advice.

32 | FAMILY COMMAND CENTER AND HOUSEHOLD OPERATIONS

Keep the moving pieces of family care visible.

Family groups shared schedules, drafts, approvals, administration, routines, and continuity controls without claiming professional staffing, provider integration, or emergency monitoring.

Area	What families can coordinate	Boundary
Command Center and households	Profiles needing attention, appointments, overdue tasks, coverage, handoffs, readiness, sync status, and separate household spaces.	Different spaces keep members, permissions, profiles, documents, activity, and settings separate.
Coverage and schedules	Availability, shifts, primary and backup helpers, assignments, handoffs, check-in/out, time zones, and visible gaps.	Not professional staffing or emergency monitoring.
Inbox and approvals	Incoming documents and updates stay drafts; authorized people can assign, review, compare, accept selected fields, reject, or clarify.	Drafts do not silently replace current records.
Shared administration	Refills, claims, expenses, reimbursements, document requests, provider communication logs, attachments, and deadlines.	No automatic ordering, provider connection, or claim guarantee.
Conferences and playbooks	Agendas, decisions, assignments, acknowledgments, follow-up, and reusable household routines.	User-maintained organization, not professional care instruction.
Consent and continuity	Members, roles, permissions, history, revoke controls, backup organizers, explicit ownership transfer, archive, and export.	Product access controls do not create guardianship, power of attorney, or other legal authority.

Apple validation boundary

StoreKit Sandbox and TestFlight purchases, production CloudKit, two-account Family behavior, real-device Apple Health, and paired companion-device behavior require owner validation. Use only the controls visible in the current released app.

33 | GLOSSARY

Words ChartNest uses deliberately.

These terms describe organizational states and workflows. They should not be read as clinical judgments.

Term	Plain-language meaning
Active profile	The person whose records and outputs you are currently viewing or editing.
Candidate fact	A possible value recognized from source material that still needs human review.
Care Case	A focused container connecting several records around one concern or goal.
Care Loop	An unresolved issue kept visible through waiting, checking, or repeated follow-up.
Canonical record	The caregiver-maintained record currently treated as the main organizational version.
Discrepancy	A possible difference, missing confirmation, or conflict that should remain visible for review.
Evidence / provenance	The source page, passage, record, or context connected to a candidate or saved detail.
Packet readiness	Guidance about possible missing or stale source material, not a completeness guarantee.
Reviewed	A user-confirmed review state; not verification by ChartNest or a clinician.
Source record	The saved medication, appointment, note, document, task, or other item behind an output.
Unresolved	A question or conflict that should not be silently treated as settled.

34 | KEEP THE GUIDE CURRENT

Use the app and Help Center as the current source of truth.

This PDF is a comprehensive reference for the audited July 2026 release. ChartNest can change as the app, plans, iOS, App Store entitlements, iCloud services, and release configuration evolve.

For current web guidance

Visit medical.chartnest.app/help for searchable feature explanations and medical.chartnest.app/support for product support. The website forms are not a place to send medical records or private health details.

Before relying on an output

- Confirm the active care profile.
- Compare important details with original source material.
- Keep uncertainty and discrepancies visible.
- Use qualified professionals for medical questions and urgent decisions.
- Preview the complete output before sharing it.
- Share only the selected information needed for the situation.

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