1. Login to CareAlign portal
   https://login.sacvalleymedshare.org

2. Click SEARCH header

Messages	0/ 3
Menu	**Search**
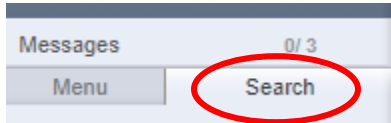
3. Ensure Extended Search button is checked.

   DOB / /
   Sex ▼
   Extended Search ☑
   Optional Demographics
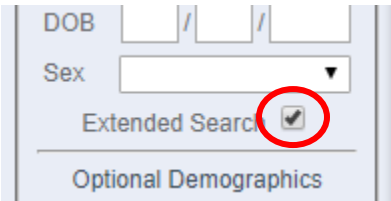
4. Input search info:
   a. Last Name,
   b. First Name,
   c. Date of Birth,
   d. Gender, *and*,
   e. **At least 2** other pieces of information listed in Optional Demographics: **Usually City & ZIP**

   Optional Demographics
   Mid Nm
   City
   Zip
   Phone
   Email
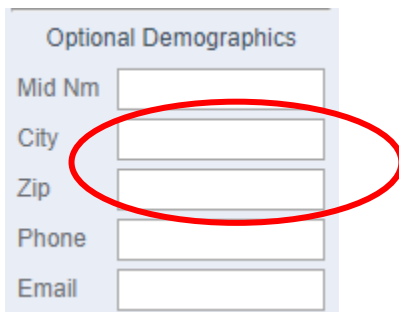
5. Choose one of the "eHx ……" connections from the dropdown next to "CareAlign Exchange"
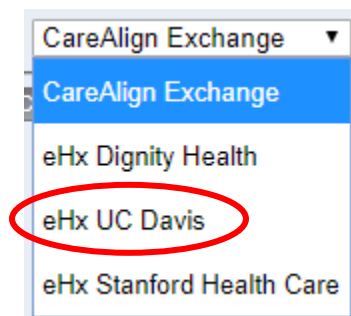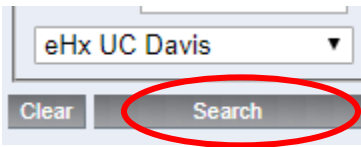
   CareAlign Exchange ▼
   CareAlign Exchange
   eHx Dignity Health
   eHx UC Davis
   eHx Stanford Health Care
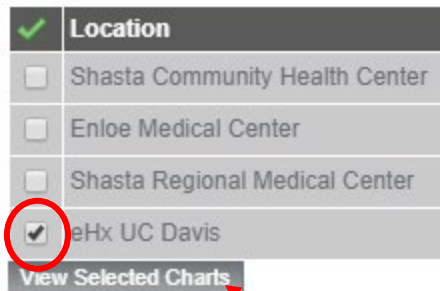
6. Click SEARCH

7. If a list does not open, click SEARCH again to rerun the it.
8. From the list that opens, uncheck all charts *EXCEPT* the eHx chart.

9. Then click *View Selected Charts*
10. A list of documents will come up

11. You can now click on any of the documents to view the contents.