

# Getting Organized: Personal Health Records

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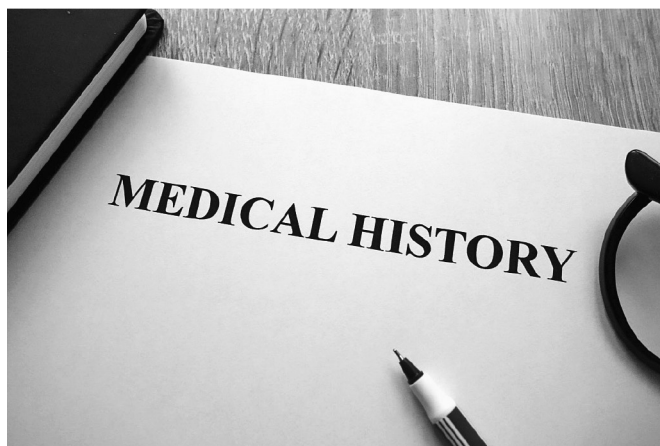
## Educational Objectives

- Participants will examine Americans' awareness and current use of personal medication records.
- Participants will identify the medical reason for keeping quality personal records.
- Participants will create their health records and essential health information.
- Participants will reflect on strategies for maintaining personal health records.
- Participants will learn tips for navigating and understanding a complex health system.

Navigating the health care system can be tricky for anyone. It can be difficult to find a primary care provider that you like. Hospitals may seem large and intimidating. Insurance coverage can vary for different types of services, and

the words and terms used by professionals might not be easy to understand. You also may not be feeling your best when you are seeking health care. Being an active participant in your care will likely improve your health outcomes and quality of life, and save time and money.

Ultimately, you are the one who has the biggest effect on your health! Keeping personal health records organized is a great first step to make your health care less stressful.



## What is a personal health record?

Receiving quality health care depends on you relaying accurate health information. A personal health record (PHR) is a collection of information about your health. It has the following:

- A list of current medications with their dosage
- Supplements and over-the-counter medications
- Allergies
- Family medical history
- Tests and results
- Complete history of surgeries and illnesses
- Vaccination record
- Blood type
- Advance directives
- All providers involved in your care

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A PHR can be electronic or on paper. You keep and update this document. It is not the same as the health record your health care provider maintains. One important thing to consider is that your PHR is portable and always available to you and your health care team when you need it the most! The document will change over time, with your health history. It is important to update your PHR as your medications and health history changes.

## Why is it important to keep a personal health record?

Many people have a primary care provider who they visit on a regular basis. Yet, there are situations where they may seek care from someone unfamiliar. The PHR information will be helpful if you need health care when you are out of town, if you are confused because of a current health problem or traumatic event, or you are in an emergency situation and unable to respond.

These records can also help you manage any chronic diseases by tracking symptoms and lab results. Monitoring these items may motivate you to actively manage your health. PHRs may include information about your healthy activities – dietary intake, physical activity, home blood pressure and blood glucose readings. Additionally, you can keep track of questions you have for your health care provider.

Having this complete information on hand can help your primary care provider coordinate the care you are currently receiving with the care you are receiving from any specialists. Health care providers may not use the same program for keeping electronic medical records, so keeping your own records can keep everyone on the same page. Keeping your own records helps you advocate for your own care!

Are you caring for other family members? Maintaining PHRs help keep track of their appointments, medications and vaccinations.

## Three Steps to Building a Personal Health Record

### Step 1: Gather Information

- Contact information for the doctors/providers who have cared for you in the past
- Dates and details of major illnesses, chronic health conditions and hospitalizations
- Family medical history
- Details of physical exams, including cancer screening tests and immunizations
- Copies of test results
- Current medication lists, dosage, who prescribed them and when
- Emergency contacts

### Step 2: Keeping Track of Medical Records

Compiling this information on an ongoing basis will create a complete and easily accessible view



of your health. Remember these strategies to help you collect the latest copies of your records:

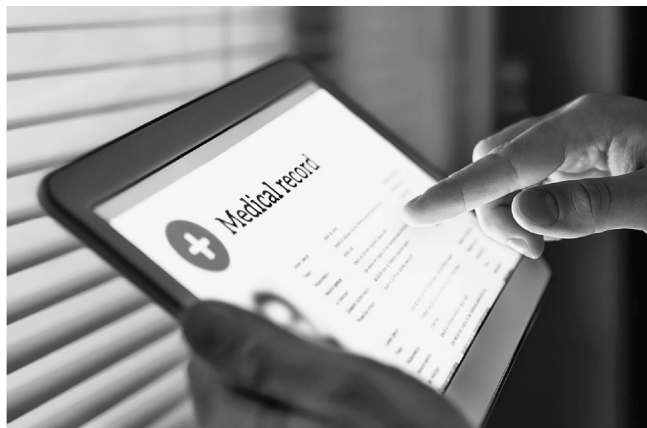
- When you have a diagnostic test or procedure, ask for a copy of the results or report.
- At each appointment, ask your doctor or nurse for a copy of anything new that's been added to your file or electronic medical record.
- If you spent time in the hospital, ask for a copy of your records when you're discharged.
- Keep copies of your medical bills and insurance claims as they occur.

### **Step 3: How to Start and Maintain a Personal Health Record**

- Type a personal health record in Microsoft Word, print it, and keep it in your purse or wallet. Carry one copy, keep one copy at home and give a copy to your emergency contact.
- Free templates are available for members online at the American Association of Retired Persons website or you can request a paper copy.
- Consult with your insurance company. Many offer free tools for personal health records.
- If your primary care doctor offers a patient portal, use it. Office staff should be able to tell you how to register for it. Most patient portals offer appointment reminders, medication lists, appointment summaries and test results.
- Use a filing cabinet, three-ring binder or desktop divider with individual folders.
- Store files on a computer where you can scan and save documents or type up notes from an appointment.
- Organize your records by date or by categories, such as treatments, tests, doctor appointments, etc.

## **Where should I look for my health information?**

The Health Insurance Portability and Accountability Act gives patients the right to view their medical records, get copies and make corrections. By law, patients and their



representatives have access to medical records, including billing information, medical test results, doctor's notes, lab reports, etc. Most hospitals and providers have a similar process for requesting records. It typically begins with a written or in-person request. You may have to sign a release before receiving your medical records. You also can call to have your medical records mailed to you. A signed medical authorization release form may be required. Some facilities give records of ongoing care for free; some may charge for copies. Providers have 30 to 60 days to comply, yet many will copy records in five to 10 days.

## **Records from a Provider No Longer in Practice**

Sometimes, patients may need records from a doctor no longer in practice. Under law, the doctor must transfer his or her records to another provider. If the doctor left a practice that is still operating, the records will remain with the practice. If another doctor bought the practice, the new practice maintains the records. If the provider didn't leave any details before leaving practice, a patient may be able to put together records from hospitals, labs and specialists they saw. The insurance company may be able to help, too.

## **Health Literacy**

Collecting, organizing and maintaining your health information is an important part of







health literacy. Health literacy is defined as, “the degree to which individuals have the capacity to obtain, process and understand basic health information needed to make appropriate health decisions.” Individuals with limited health literacy incur medical expenses that are up to four times greater than patients with adequate literacy skills. Everyone at some point needs help understanding or acting on important health information or navigating a complex system. Even highly educated individuals may find health systems too complicated to understand, especially when a health condition makes them more vulnerable.

Your personal health record will give you the information and confidence you need as a health consumer. When you visit a health care provider, be prepared with questions, ask about details of your care and for copies of records to include in your PHR. You can make a list of any information that you do not understand to

discuss during your next visit. Additionally, when you understand this information, you are more informed about what decisions you are able to make as a consumer of health care. The long-term effects of health literacy include a reduction in patient’s time spent with his or her health care provider, a reduction in the overall costs to the consumer, and compliance with insurance companies’ health plan quality standards.

## Club Discussion Questions

- Have you ever had to dig through papers to find important health records?
- Do you help with someone’s health care, like a parent, child, spouse or neighbor?
- What word would you use to describe your current organization of personal health records?

## Resources

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