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New Tool Can Help Patients and Family Caregivers Get, Use, and Share Health Records

14 Leading Health Care Organizations Commit to Advancing Re-Imagined Records Request Process

WASHINGTON, D.C. – September 21, 2018 – Each year, hundreds of thousands of patients request copies of their medical records under the Health Insurance Portability and Accountability Act (HIPAA), the nation’s privacy law. Completing the request often means filling out confusing paperwork and struggling to obtain electronic formats that can be easily placed in an app or other secure location. The technology exists to streamline this process for everyone involved – patients, providers, and medical records experts alike – but the U.S. health care system has struggled to move forward.

That’s why a diverse and powerful group of health information technology experts joined forces to develop a new digital health records request approach, released today at the Biden Cancer Summit in Washington, D.C. Led by [X4 Health](#), a purpose-driven organization founded by consumer advocates, the new prototype tool, called the “[Health Record Request Wizard](#),” streamlines and simplifies the records request process and promotes digital formats. The effort was supported by a grant from the Commonwealth Fund.

“The Wizard is a game-changer for patients, families, and health care providers alike,” said Christine Bechtel, co-founder and president of X4 Health. “This tool will help bring an outdated process into the 21st century and make it easier to obtain and organize health records in electronic formats, ultimately helping create a comprehensive picture of a person’s health.”

Aneesh Chopra, president of CareJourney and former U.S. Chief Technology Officer, served as an advisor on the Wizard project and said, “The Wizard is a true consensus-driven reference implementation for something we so desperately need – an easy way for patients to request digital copies of their health data in the form and format of their choice. By designing the Wizard with key stakeholders – patients, medical records professionals, apps, and others – it offers an ‘easy button’ for implementation. As such, I call on all health care providers to adopt and use this framework.”

The tool is the result of a year-long research and development effort to build upon the popular model form previously created by the American Health Information Management Association (AHIMA), a key collaborator in the Wizard creation. The Wizard is a digital “smart form” that uses branch logic and skip patterns to help consumers articulate what they need, in what format and by when. It results in a highly specific, HIPAA-compliant document delivered to the health care provider’s medical records specialist.

The project involved testing with consumers and health information management professionals; results can be found online at X4Health.com/healthdata.

“The Wizard takes the model form, developed by our member volunteers at AHIMA, one step further,” said Pamela L. Lane, vice president for policy and government relations at AHIMA. “It provides an innovative tool that can be used by health information management professionals to change workflow processing for consumer-generated information requests. The Wizard will help create ever-better consumer engagement experiences by streamlining complexity in the healthcare environment.”

A number of leading organizations have committed to incorporating key lessons from the Wizard project – and potentially the tool itself – into their own work. “These organizations are forward-thinking leaders who believe in putting the needs of consumers first when it comes to their health data,” said Bechtel.

Organizations include CIOX, a leading health technology company that powers the majority of health records requests and fulfillments in the United States. “We’re enthusiastic about integrating the lessons learned from the Wizard into our products as part of our commitment to ensuring accurate and usable clinical data gets into the hands of those who need it most – doctors and patients,” said Paul Roma, CEO of CIOX.

Committed organizations include:

- AHIMA
- CareJourney
- CARIN Alliance
- Ciitizen
- CIOX
- Door County Medical Center
- Marshfield Clinic Health System
- National Partnership for Women & Families
- NewWave
- Norton Healthcare
- Swellbox
- Texas State University Department of Health Information Management
- University of Wisconsin HIM and Technology Program
- X4 Health

Dozens of organizations and individuals were involved in the development and testing of the Wizard, including representatives from AHIMA, CARIN Alliance, CareJourney, Swellbox, and more – as well as community-based patients and families.

In addition to a live prototype of the Wizard, found at healthrecordwizard.com, X4 Health released an implementation package detailing how others can operationalize and expand the Wizard. More can be found at X4Health.com/healthdata.

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X4 Health is a purpose-driven organization dedicated to accelerating the quadruple aim of health care: better care, better health, lower costs, and better experiences for both patients and health care professionals. Learn more at www.X4Health.com.