

# Keeping and Organizing Medical Records

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Medical records in many institutions and clinics have gone to an electronic format and are often easily accessible to parents. Likewise, as we become more electronically organized as consumers, it might be helpful for parents to think about keeping their own records organized in a computer file or on a portable flash drive.

## **Why should you keep copies of your child's medical records?**

Keeping copies of your child's medical records is an important part of your role as your child's advocate. Here are some reasons for keeping these records:

1. You can take time to review the records for accuracy.
2. You will gain more detailed knowledge about your child's condition. This will help you feel more comfortable when you talk to your child's doctors.
3. You will have a resource to answer questions about your child's condition.
4. You will have the records on-hand during emergencies. Emergency departments may not have easy access to your child's records. You should bring the most current and relevant records with you if your child needs an emergency room visit.
5. If your child sees several specialists, you can collect all your child's records and keep them together in one place for easy access.
6. You will have records available if you file an appeal for health coverage or apply for a public health care program.

## **How do you get copies of medical records?**

In Minnesota, you have the right to get copies of your child's medical records. (See PACER Center's Fact Sheet [Access to Your Child's Health Records](#).) The law says that you must be given copies of records "promptly" if you ask for them in writing.

## **Suggestions for organizing medical records**

Keeping track of your child's medical records can be overwhelming. Once you create a recordkeeping system, organizing the records should become easier. Here are some suggestions:

1. Use a three-ring binder divided into relevant sections. (See page 2)
2. Purchase a commercial medical record organizing system.
3. Keep all records in a box until you have the time and energy to organize them into a three-ring binder. This way you will still have the information, even if you don't have the opportunity to organize it.
4. Keep summary charts, current medications on a flash drive to take with you in an emergency.

5. Here are a number of online resources available to help organize medical records. The following are some suggestions:
- The first place to check is your provider's website. His site may already contain information about office visits, lab tests, and x-ray results, in an organized manner.
  - Many health insurance companies also have online personal health care records, where you can add information from multiple sources, and for all of your family members.
  - **HealthVault** is an online resource that allows you to keep all of your family's information and various types of health information on all of your devices so that you can track it.
  - **My Medical App™** is an app for Apple and Android products that keeps medical information for the whole family, which is stored on your device, not on a server, allowing for greater privacy. [mymedicalapp.com](http://mymedicalapp.com)
  - **My Personal Health Record** assists users in setting up their own online or paper medical record, but has multiple links and information about a variety of medical conditions.
  - Finally, [freeprintablemedicalforms.com](http://freeprintablemedicalforms.com) has a variety of forms for tracking common symptoms to specific diseases, such as blood sugar levels, insulin doses for diabetes, and headache or seizure frequency with associated symptoms.

### Organizing a three-ring binder system

Every child has a unique set of records. Your binder or computer file will not necessarily contain all of the sections listed below. However, you can use this list as a guide to help you get started.

1. **Addresses/phone numbers:** List contact information for your child's primary care physician, specialists, and pharmacist.
2. **Medications/immunizations:** Keep a chart of medication and immunization information that details the dates given, any side-effects, medication changes, and the reasons for the changes.
3. **Lab/test results:** Keep track of the type of tests taken, dates performed, the location, reference norms, and results.
4. **Doctor visits:** Keep a list of the date, the doctor visited, symptoms, diagnosis, and the outcome of the visit.
5. **Medical history:** Detail your child's diagnoses, any specialized plan for handling illness, surgeries, past hospitalizations, growth and development information, adaptive equipment used, and other past health information pertinent to your child.
6. **Therapies:** Keep information about therapies that your child receives, including the type, provider names, and dates.
7. **School information:** Keep a list of contact people within the school system, a record of phone calls, and education records, including IEPs, report cards, and notes from meetings.
8. **Advocacy records:** Keep a record of phone calls made to advocacy organizations.
9. **County Services:** Keep names and numbers of all contacts for county services including MNChoice Assessor, financial worker, case manager, and public health agency and nurses. Record your case number.
10. **Home health care:** Keep a chart of telephone records with home care agencies and copies of service plans. This includes any agency that provides PCA staff, any type of personnel, or nursing.

11. **Financial/insurance information:** Keep a record of phone calls to insurance companies, a copy of your benefit plan, insurance claims, bills, and payments made. If you have a significant amount of insurance records you may want to create a separate binder to collect and organize this information.
12. **Phone record:** Keep a list of phone calls made to health care providers and other persons involved in the care of your child. The list should indicate who you spoke with, the date, reason, and follow-up information.

### **Keep your own notes** .....

**Notes about your child's condition.** Keep detailed notes about your child's condition when you notice unusual changes. The information that you record will depend on your child's situation. You may want to record factors such as: temperature, eating patterns, sleeping patterns, changes in behavior and reactions to medication. Be sure to record exact times of the events you note. This information is important for the doctor to consider and more useful than a general description.

**Notes about calls to the doctor's office.** You may consider keeping a spiral notebook by your telephone to keep a log of phone calls to your doctor's office. In addition to writing down what was discussed, record the date and time of the call along with the name and title of the person that you spoke with. This way you will have detailed information available for follow-up calls.

Alternatively, many doctor's offices have now gone to electronic medical records, and you can access health information that your clinic provides, such as a record of office visits, lab reports, x-ray reports, and results of other studies. Check with your specific clinic to learn what information is accessible; and set-up your account.

Consider creating a one-page summary about your child. This would go at the front of your medical record with a brief summary of your child's medical condition. It should include a list of diagnoses, current medications, allergies, recent hospitalizations, and "active", current problems. Think of it as a way to communicate the most pertinent information to an emergency room doctor, if you are not available to be present.