



The Office of the National Coordinator for  
Health Information Technology

# Improving patient experience and decreasing administrative burden with the Record Request Wizard

X4 Health & Swellbox

Jeff Seidl, Head of Partnerships | Swellbox



# Who We Are



Purpose driven organization co-founded by two consumer advocates, working to advance health care's quadruple aim of better health, better care, lower costs and better experiences for patients, families and health professionals.



Digital health technology company for university health centers looking to enhance patient engagement and data empowerment.

# Partners & Key Stakeholders

## The Project Team

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- X4 Health, Christine Bechtel, *Project Director*
- Swellbox, Brian Korb and Jeff Marrone, *Wizard Architects*
- Customer Sense Consulting, Nicole Rubin, *NY and DC Research*
- Teri Clough LLC, *Denver Metro Research*
- Waldo Law Offices, Ann Waldo, *HIPAA Expert*
- Lauren Sogor, *Communications and Marketing*
- NewWave, Aaron Seib, *Technical Advisor*

## Key Stakeholders

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- American Health Information Management Association (AHIMA) leaders, staff, and members
- CARIN Alliance staff Ryan Howells and David Lee, and members
- Care Journey
- Cedars Sinai Medical Center
- Cone Health
- Children's Medical Center
- Ciitizen
- Hyland
- Marshfield Clinic
- Memorial Sloan Kettering Cancer Center
- National Partnership for Women & Families
- Norton Health Care
- Texas State University
- U.S. Department of Health & Human Services

# The Project

## Our Research Objectives

1. Build on the [model form](#) created by the health information management professionals of AHIMA.
  2. Examine ways to promote digital records.
  3. Understand consumer experiences when requesting their medical record.
  4. Explore stakeholder needs – records managers, CIOs, app companies, and more.
- **Goal: Free health data for patient engagement**

## AHIMA's Model Patient Access Form

Patient Request for Health Information			
<b>Patient Information (Please Print)</b>			
First Name:	Middle Initial:	Last Name:	
Name at Time of Treatment (if different than above):			
Date of Birth (MM/DD/YYYY):	Phone:	E-mail (optional):	
Street Address:	City:	State:	Zip:
<b>What records do you want? (Check appropriate boxes below):</b>			
Date(s) of Service: ____/____/____ through ____/____/____			
<input type="checkbox"/> Discharge Summary <input type="checkbox"/> Emergency Room Records <input type="checkbox"/> Operative/Procedure Reports <input type="checkbox"/> Billing Records			
<input type="checkbox"/> Test Results (X-Rays, Lab/Pathology Results) Please specify: _____			
<input type="checkbox"/> Other (Immunization Records, Medication Lists) Please specify: _____			
<b>How would you like your records delivered?</b>			
<input type="checkbox"/> Paper			
<input type="checkbox"/> Home Delivery			
<input type="checkbox"/> In-Person Pickup			
<input type="checkbox"/> Electronic (Email, USB, CD, Portal, Other) Please specify: _____			
<b>Where do you want the information sent? (Fill in boxes below):</b>			
ORGANIZATION NAME should provide my records to: <input type="checkbox"/> Self <input type="checkbox"/> Personal Representative (indicated below)			
Recipient Name:		Recipient Phone:	
Recipient Mailing Address:		Recipient Fax:	
		Recipient E-mail (if applicable):	
<b>Please print your name and sign below:</b>			
Name of Patient or Personal Representative (please print)		Relationship (please print)	
Signature of Patient or Personal Representative		Date/Time	
<b>Please return completed form to:</b>			
		E-mail:	
		Fax:	
		Questions?	
<small>ORGANIZATION NAME recognizes a patient's right under HIPAA to access copies of his/her health information. There may be charges associated with processing a request and producing requested records.</small>			

# The Problems

## We Found That....

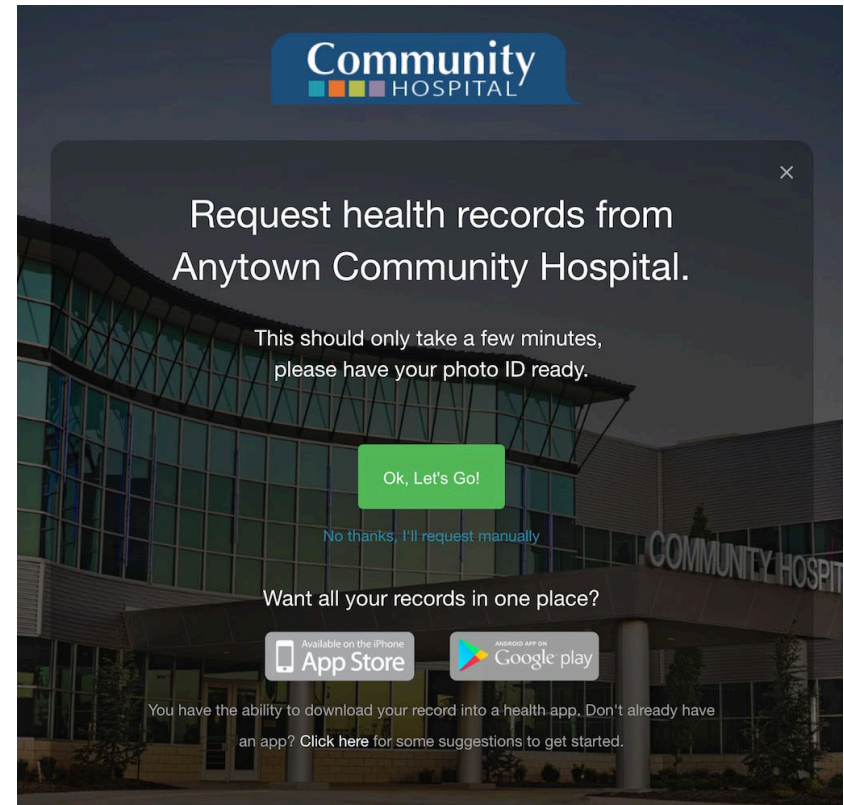
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- Today's paper or PDF-based forms aren't working for professionals OR patients.
- Health records managers spend a ton of time clarifying and following up on individual requests.
- If even a small % of requests received were exquisitely clear, it could:
  - **Save time and money** for records managers and health systems.
  - Get records into the hands of patients **faster**.
  - **Improve patient experience** and satisfaction.

# The Solution

## Digital Wizard Prototype

- A smart form that uses branch logic and skip patterns to help consumers articulate what they need, in what format, by when.
- Results in a **digital PDF request** including photo ID, verified phone number, signature and documentation attachments for caregivers.
- Focused on **individual patient access** requests only (vs. third party authorizations).



<http://www.healthrecordwizard.com/>

# Calls to Action

## Health Systems:

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- **Adopt the Wizard**
  1. Implement using resources at [www.x4health.com/healthdata](http://www.x4health.com/healthdata)
  2. No-cost pilot with Swellbox
- Make a public commitment via [www.x4health.com/healthdata](http://www.x4health.com/healthdata)

## Policymakers:

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- **Change e-signature language**
  - » “MAY accept” → “MUST accept”



## Thank You

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