

Patient Access Playbook: Introduction

Patients have a right to access their medical records. It is critical that practices help provide patients with their own health information, not only because it's the law but also because it is the right thing to do.

A range of medical professionals have a role—major or minor—in responding to and fulfilling requests to share patient health records. While responsibilities vary widely across practices, this may include receptionists, office managers, medical records personnel and—to varying degrees—health care providers, such as medical assistants and physicians.

Personal representatives, family members, non-clinical caregivers and other members of the care team also play a big role in helping patients access their records. Whenever you consider patient access questions or issues, remember that patients often rely on others to help them with access, and you should respect a patient's desire for you to share their records with their care team on their behalf.

Playbook contents

Legal requirements

HIPAA (Health Insurance Portability and Accountability Act) provides patients with the right to obtain copies of medical records in their preferred form and format when a practice is able to do so.

Putting it into practice

If your electronic health record (EHR) is certified by the Office of the National Coordinator for Health Information Technology (ONC), it should have certain minimum capabilities. But those capabilities will not do much good if you are not familiar with them.

Special topics

Read topic briefs, including real-world scenarios, about barriers associated with accessing images, records of the deceased and records from practices that are closed.

The world of apps

Patient-facing smartphone apps can help patients access health information, but privacy should be top of mind for patients since apps vary widely in the extent to which they keep one's information private and secure.

Frequently asked questions

Questions and answers about patient access, EHRs and more.

Information blocking

Federal regulation prohibits medical providers and EHR vendors from standing in the way of patients receiving their own health information, a process known as "information blocking."

Key points to remember (PDF)

With patient access, there are many important things to keep in mind, from patient rights to delivery to considerations for non-clinical caregivers.

Patient records request flowchart (PDF)

An instructive diagram outlining the steps and choices involved in patient access.

Download the playbook

The Patient Access Playbook (PDF) focuses on dispelling HIPAA myths and helping physicians understand their obligations to provide patients with access to their health information.