

Sharing Medical Records with your FORM Team

Before you can meet with your FORM team, we need to have your medical records on file to ensure patient safety. We proactively reach out to your primary care provider on file to request a copy of records, but we have found that waiting for their response can delay your appointment scheduling. We find that primary care offices respond much more quickly to direct requests from patients than from outside providers.

What does FORM need?

Required information:

Progress note or History & Physical note from your primary care provider dated within the last 12 months. It is a requirement to be enrolled in FORM that you have had a visit with your primary care in the last 12 months.

Helpful information (but not required)

1. Lab results from the last 6-12 months.

Typically, your medical team requests the following:

- CBC (complete blood cell counts)
- CMP (comprehensive metabolic panel) or BMP (basic metabolic panel)
- Creatinine and/or GFR
- HgbA1c (hemoglobin A1c)
- Lipid panel (total cholesterol, LDL-C, HDL-C, triglycerides)
- TSH (thyroid stimulating hormone)
- Optional: If you have a history of bariatric surgery, any vitamin studies from the last 6-12 months.

Note that if you have not had labs drawn within the last 6-12 months, your medical provider will likely order them at the visit.

2. Problem List

3. Medication List

Why does FORM need this information?

The medical records allow your FORM medical team to provide a complete evaluation, which includes understanding your medical history,

what labs you have or have not recently had, and a lot of important safety information in order to consider prescribing any medications. **Having the medical records helps ensure you to get the most out of your visit.**

Where can I find this information?

You may have access to your records through your **primary care patient portal** (such as [MyChart](#)). If not, **contact your primary care provider directly** and request that they fax the previously described records to 617-928-8401.

How do I share my records with FORM?

The best way is to first access your records from a computer. The next page has a step-by-step guide that details how to share records from MyChart. Similarly, other patient portals may allow you to print as a pdf that you can save to your computer. Please make sure your name and/or date of birth are included on at least 1 page of this document.

Once saved as a PDF, you can upload the documents to the secure FORM portal at <https://my.formhealth.io/upload> or fax to 617-928-8401.

Please do NOT upload screenshots of your medical records to the food log unless specifically requested by your FORM provider. Screenshots are often missing key information such as your name, date of birth and date of collection that ensures we have the correct information and avoids medical errors.

What if I don't have access to my medical records?

If you don't have access to your medical records, no worries. We'll still reach out to your primary care. It will just take us a little longer to get your first appointment scheduled. **We'll reach out to schedule your first appointment once we've got your records in hand.**

Thank you for your assistance!

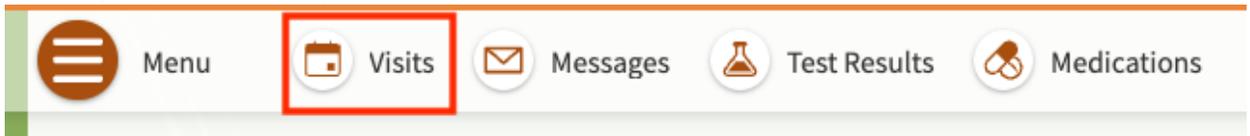
Note: the information below may be easier to read on your computer. You can access this handout in your portal at my.formhealth.io under Resources.

Sharing MyChart Records

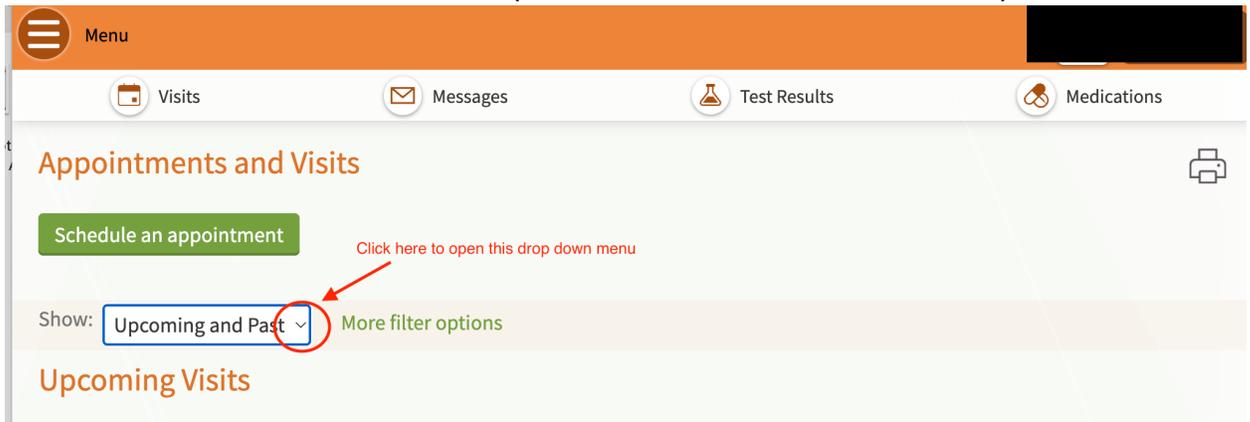
If you have access to MyChart and would like to share records, please complete the following steps to obtain PDF files that you can upload to the FORM portal. **It is best to do this from a computer rather than a mobile device.** Our providers typically request the most recent primary care appointment **Visit Note** any recent **Test Results** (within the last 6-12 months).

Sharing a Visit Note:

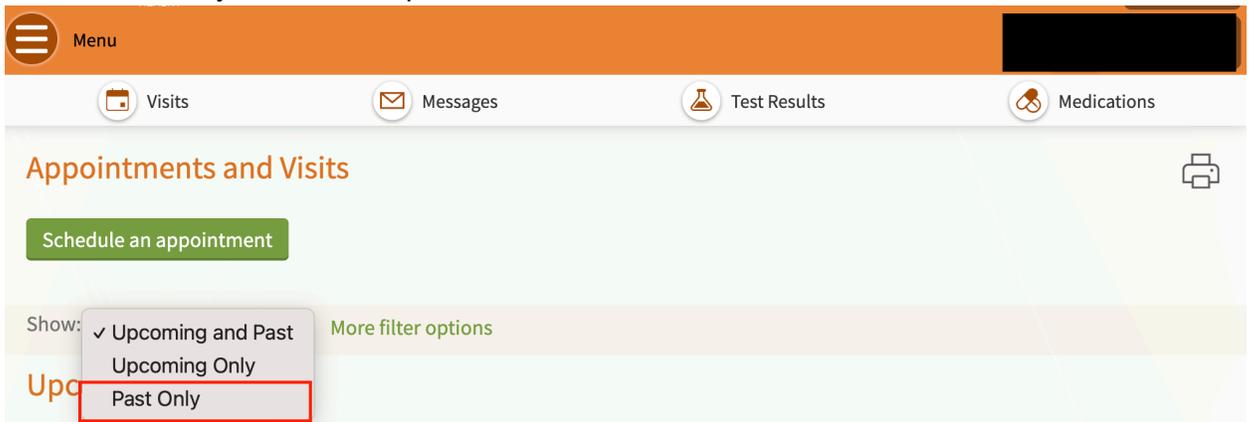
1. After signing into your MyChart, find and click the “Visits” button:



2. On the next screen, find the “Show” drop-down menu and click the arrow to open it.



3. Select “Past Only” from the drop down



- This should open up a page with all of your past visits. Select the visit record that you'd like to send and click "View notes"

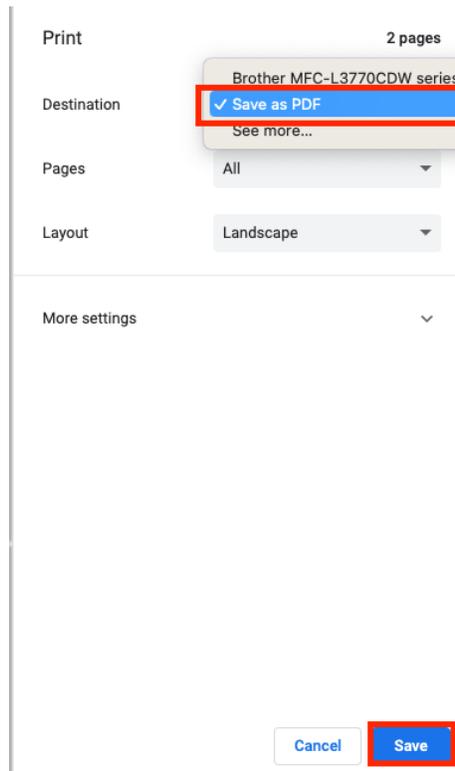
Screenshot of the "Past Visits" page. At the top, there is a green button labeled "Schedule an appointment". Below it, a filter dropdown is set to "Past Only" with a "More filter options" link. The main section is titled "Past Visits" and features a vertical timeline on the left with markers for "Last 3 Months" and "6 Months Ago". Three visit cards are displayed:

- Top-left card: Date "MAY 10 2023". A red box highlights the "View notes" button, with a red arrow pointing to it and the text "Click here to open the note for this visit". Below it is a "View After Visit Summary" button.
- Top-right card: Date "APR 26 2023". It has "View notes" and "View After Visit Summary" buttons.
- Bottom card: Date "OCT 26 2022". It has "View notes" and "View After Visit Summary" buttons.

- This should take you to a new page with your Visit Note. Locate the printer icon and click it. Alternatively, you can click the "File" drop down menu on your internet browser and select "Print."

Screenshot of the "Appointment Details" page. The title "Appointment Details" is at the top. Below it, there are two tabs: "After Visit Summary" and "Notes". A printer icon is circled in red, indicating where to click to print the document.

6. The Visit Note will open in a new window ready for printing. Instead of sending the file to your printer, locate the “Destination” drop down menu pictured below and select “Save to PDF” and then click “Save.”



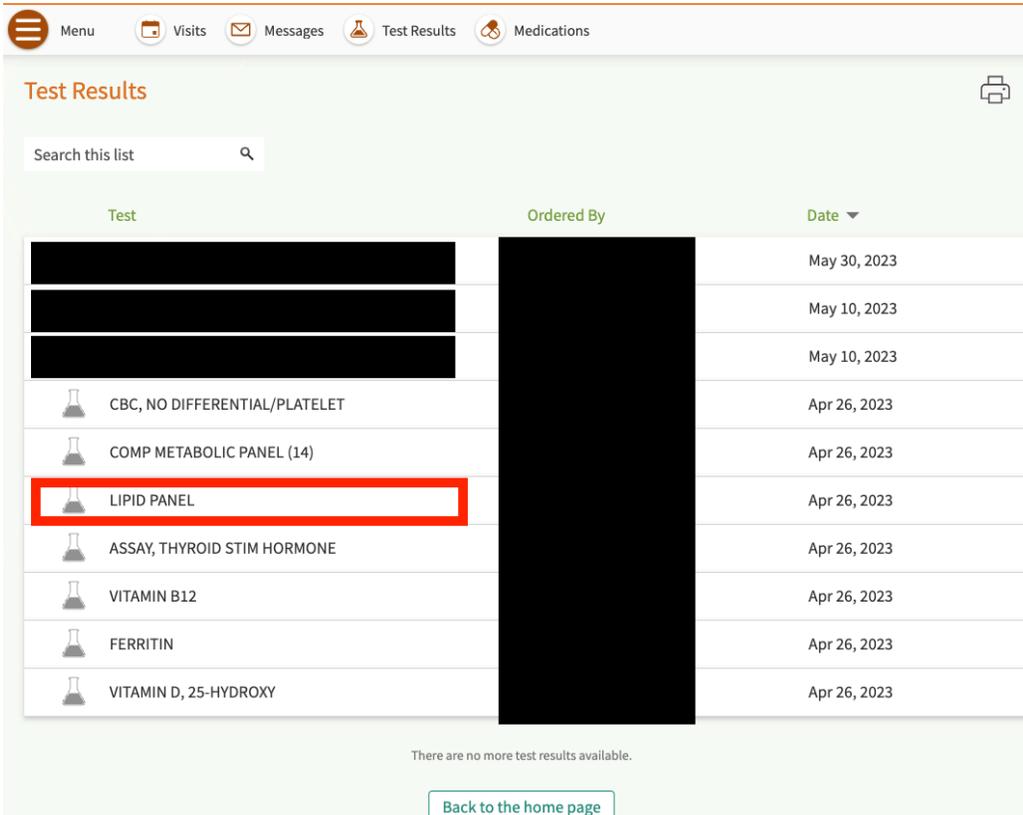
7. Next, go to the FORM portal at <https://my.formhealth.io/upload> to upload the saved document.

Sharing Test Results:

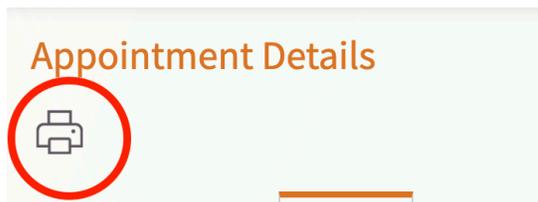
1. After signing into your MyChart, find and click the “Test Results” button:



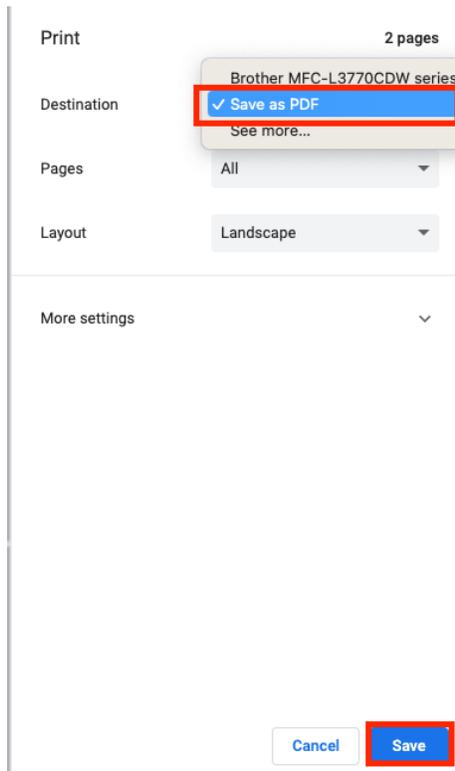
2. Click the test name on the left side to view the result report. If you have questions about what tests should be uploaded, please message your care team.



3. This should take you to a new page with your Test Result. Locate the printer icon and click it. Alternatively, you can click the “File” drop down menu on your internet browser and select “Print.”



4. The Test Result will open in a new window ready for printing. Instead of sending the file to your printer, locate the “Destination” drop down menu pictured below and select “Save to PDF” and then click “Save.”



5. Next, go to the FORM portal at <https://my.formhealth.io/upload> to upload the saved document.