



Moving Your Records When You Switch Doctors or Health Systems

— and Keep Your Own Copy

————— An Extended Guide · No. 1755 —————

Tech Made Simple. Service Made Personal.

Bill Davis — Bill's Home Tech

(330) 200-8042 · bill@billshometech.com · Atwater, Ohio

Book a visit — billshometech.com/book

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SUMMARY

The 60-Second Version

If you read one page first, make it this one. When you leave one doctor for another, your records stay in the old office's system. They only move when you (or the new office) request them. You have a legal right to a copy, and a short form — a release or authorization — is usually all it takes to send them on.

- Your patient portal is tied to one health system. A new system means a new portal and a new login — your old one keeps the old records.
- Ask either office for a release form; it says who to send records to and which ones.
- Always keep your own copy — download or print the key pages and tuck them in a folder at home.
- Before a first visit, gather a current medicine list, your allergies, and any recent test results.

WATCH OUT

This is information, not medical advice. I help you move and organize the paperwork and the apps. What your records mean for your health is a conversation for your doctor or nurse. If you ever feel truly unwell, don't wait on paperwork — call your doctor, or 911 in an emergency.

THE BASICS

1. What Actually Moves When You Switch

Less than most people assume — until they ask.

Here's the thing nobody tells you when you change doctors: your records don't come with you. They live in the old office's computer system, and that's where they stay until someone makes a request. There's no central file cabinet in the sky that every doctor can reach into. Each office keeps its own chart.

So when you walk into a new practice, they start with a blank page unless your history has been sent ahead or you've brought it with you. That's not a mistake or a failure — it's just how medical records work. Once you understand it, the steps to move them are simple and well worn.

GOOD TO KNOW

Doctors inside the same health system usually can see one another's notes about you. The gap opens when you cross from one system to a different one — that's when records have to be moved by hand.

YOUR RIGHT

2. Your Right to a Copy of Your Records

The law says the records are yours to have.

You don't have to ask nicely or explain why. Under federal privacy law, you have the right to get a copy of your own medical records and to tell the office where to send them. The office holds the original; you're entitled to a copy. They can't hold your records hostage over an unpaid bill, either.

- You can ask for a copy for yourself, or ask that a copy be sent to a new doctor.
- You can ask for everything, or just the part you need.
- You can get it on paper, on a disc, or sent electronically to a portal or app, when the office offers that.

GOOD TO KNOW

The office keeps the legal original even after you move on. That's normal — they're required to hold records for years. What you're getting is a faithful copy, which is all a new doctor needs.

TWO PATHS

3. Two Ways to Move Your Records

Office-to-office, or you carry them yourself.

There are really just two ways records get from the old doctor to the new one, and you can use either or both. The first is office-to-office: you sign a form and the old office sends the records straight to the new one. The second is to carry them yourself: you get a copy and hand it over.

I usually suggest doing both. Let the offices handle the official transfer, and also keep a copy of your own so you're never standing in a waiting room empty-handed while two computer systems argue with each other. Belt and suspenders.

TIP

The easiest first move is to ask the new office, at the time you book, "Do you want to request my records, or should I?" Many new practices will do the requesting for you if you sign their form.

THE FORM

4. The Release Form, in Plain English

One short page that gives permission.

The piece of paper that makes it all happen goes by a few names — a release of information, a records authorization, a transfer request. They're the same idea: a form where you give permission to send your records and say exactly where. Many offices let you fill it out right in the patient portal instead of on paper.

- Your name, date of birth, and any other names your records might be filed under.
- Who to send the records to — the new provider's name, address, and fax or secure email.
- Which records, and sometimes a date range (for example, the last few years).
- Your signature and the date; the form usually has an expiration date and a note that you can cancel it in writing.

TIP

If a form asks for your Social Security number, ask whether it's truly required. Often it isn't, and the less of that number floating around on paper, the better.

THE PORTAL

5. Why a New System Means a New Portal

Your login belongs to the health system, not to you.

This trips up almost everyone. Your patient portal — the website or app where you see results and message the office — belongs to one health system. In Northeast Ohio, several big systems use a portal branded MyChart, but a MyChart at one system is a separate account from a MyChart at another. Same look, different box.

So when you move to a new system, you don't log into your old portal and find the new doctor there. You set up a brand-new login for the new system. Your old portal keeps right on showing your old records — it doesn't vanish — but it won't fill up with anything new from the place you left.

GOOD TO KNOW

Because the labels and menus differ from one system to the next, I'll keep this guide general about exactly where to tap. When in doubt, your provider's MyChart help page or the front desk can point you to the right button.

WHAT MOVES

6. What Transfers Automatically — and What Doesn't

Spoiler: almost nothing moves on its own.

It would be lovely if your whole history slid over the moment you booked with a new doctor. It doesn't. Between two different health systems, essentially nothing moves automatically. Your records, your message history, your scanned documents, your list of past visits — all of it stays with the old system.

- Does NOT move on its own: your records, your portal messages, your appointment history, your uploaded documents.
- Moves only if sent: anything you request be transferred, or carry over yourself.
- Sometimes shared behind the scenes: with your permission, some systems can look each other up through a records-sharing network — but don't count on it.

WATCH OUT

Never assume the new doctor already has your history just because you're in the same city. Ask at the first call. Assuming it's there is how people end up repeating tests they've already had.

YOUR PHONE

7. Carrying a Summary on Your Phone

A pocket-sized copy you always have with you.

Modern phones can hold a surprisingly good summary of your health records, pulled from the portal. On an iPhone, the Health app has a Health Records feature that connects to many systems; on Android phones, a similar setup uses Health Connect with supported apps. Once connected, your medicines, allergies, conditions, and recent results ride along in your pocket.

This won't replace a full records transfer, and what it can pull depends on your health system and app versions. But as a quick reference you can hand to a new doctor — or glance at yourself — it's genuinely useful, and it's free.

TIP

Connecting your phone to a system you're leaving still works. Do it before you drift away from that portal, so the summary is captured while your login is fresh in your memory.

SHARE BUTTON

8. The Portal's "Share" Feature

Sending a snapshot straight from the portal.

Most portals have a built-in way to share a copy of your record. The exact label varies — you might see a Sharing Hub, a "Share My Record," or a "Send record to another provider" choice — but the idea is the same. You can send a point-in-time snapshot of your chart to another doctor, or download it to keep.

- Look for a menu item with the word "Share," "Sharing," or "Record" in it.
- Some let you send directly to another provider who also uses a connected system.
- Some generate a document you can download, then print or email yourself.
- Labels vary by system — check your provider's MyChart help page if you can't find it.

GOOD TO KNOW

A shared snapshot is a summary — medicines, problems, recent results — not necessarily every note and scan ever written. For the complete file, you still go through a records request.

THE REQUEST

9. Requesting Records From the Old Office

Where to call and what to say.

To get records out of your old office, you'll deal with its medical records department — sometimes called Health Information Management, or HIM. At a small practice it might just be the front desk. Either way, a short, clear request does the trick.

- 1 Call the old office and ask for medical records (or HIM).
- 2 Say you're moving to a new provider and want a copy of your records sent — and a copy for yourself.
- 3 Ask what form they need and whether you can do it in the portal.
- 4 Give them the new provider's name, address, and fax number.
- 5 Ask how long it will take and whether there's any fee.

TIP

Write down who you spoke with and the date. If records are slow to arrive, that note turns a frustrating mystery into a quick follow-up call.

THE HAND-OFF

10. Giving the Records to the New Office

Make sure they land where they're needed.

Getting records sent is only half the job; the other half is making sure the new office actually receives and files them. Papers and faxes do go astray. A quick confirmation call closes the loop and spares you a surprise at the first visit.

- If you're carrying a copy, hand it to the front desk and ask them to scan it into your new chart.
- If the old office faxed it, call the new office a few days later to confirm it arrived.
- Ask the new office if anything's missing that they still need.
- Bring your own copy to the first visit as a backup, just in case.

GOOD TO KNOW

New practices usually prefer to receive records a week or two before your first visit, so a nurse can review your history ahead of time. Start the request as soon as you book.

YOUR COPY

11. Keeping Your Own Copy

The habit that saves you every single time.

If you take one practical habit from this guide, let it be this: always keep your own copy. Offices close, systems change, portals get retired, and the one time you need your history in a hurry is the one time the transfer hasn't gone through yet. Your own copy is the version nobody can lose for you.

- Download the key documents from your portal before you leave a system.
- Print the most important pages — medicine list, allergies, recent results, major diagnoses.
- Keep them together in one spot, paper or on your computer.
- Refresh the copy once a year, around a birthday or the new year, so it stays current.

TIP

This is exactly the kind of afternoon project I'm glad to sit down and do with you — we get your records downloaded, printed, and filed once, and then you have them for good.

AT HOME

12. Setting Up a Simple Home Records Folder

One folder, a few dividers, done.

You don't need software or a filing system a hospital would envy. A single accordion folder or a three-ring binder on a shelf does the job for most people. The goal is that if you — or a family member — needed your health history in five minutes, you could put a hand on it.

- A current medicine list right at the front, dated.
- A page of allergies and past reactions.
- Recent test results and any imaging reports.
- A list of your doctors with phone numbers.
- Copies of important records from past providers.

GOOD TO KNOW

If you'd rather keep it on a computer, a single folder named "Medical" with clearly named files works just as well. Back it up somewhere, and tell one trusted person where to find it.

FIRST VISIT

13. What to Gather Before a First Visit

Walk in ready, not scrambling at the clipboard.

A first visit with a new doctor always comes with a clipboard of questions about your history. You can answer them calmly and accurately if you bring a few things along, instead of trying to remember the name of that pill you started three years ago while a nurse waits.

- A current list of every medicine, vitamin, and supplement, with doses.
- Your allergies and what reaction each one causes.
- Major conditions, past surgeries, and rough dates.
- Recent test results or imaging, if you have them.
- Your insurance or Medicare card, and a photo ID.

TIP

Bring the actual pill bottles if a list feels daunting. A new doctor would always rather see the real bottles than guess from memory.

YOUR MEDS

14. Building a Current Medicine List

The single most useful page you can carry.

If there's one document worth keeping perfect, it's your medicine list. Every new doctor asks for it, every hospital asks for it, and getting it right is one of the plainest ways to stay safe. It isn't hard — it just needs to be current and complete.

- The name of each medicine (brand and generic if you know both).
- The dose and how often you take it.
- Why you take it, in a word or two, if you know.
- Over-the-counter things count too — aspirin, vitamins, supplements.
- Note anything you recently stopped, and why.

GOOD TO KNOW

Your pharmacy can often print a full list of what they've filled for you. That printout is a great starting point — just add the over-the-counter items it won't know about.

ALLERGIES

15. Writing Down Your Allergies

A short page that can prevent a bad day.

Allergies are one of the first things a new doctor needs and one of the easiest to get muddled when records don't transfer. A clear page saves everyone guessing — and keeps a new team from prescribing something your body won't thank you for.

- List each medicine, food, or material you react to.
- Say what the reaction is — a rash, swelling, trouble breathing, an upset stomach.
- Note how serious it was, if you remember.
- Mention if it was so long ago you're not sure it still holds.

WATCH OUT

I can help you write this page down clearly, but whether something is a true allergy or a side effect — and what it means for your care — is for your doctor or pharmacist to judge. Don't drop or add a medicine on your own.

PAST RESULTS

16. Gathering Past Test Results and Imaging

So the new doctor isn't starting from zero.

Recent blood work, a recent scan, the report from a procedure — these are the pieces a new doctor most wants to see, because they save you from repeating tests you've already had. Gather what you can, especially anything from the last year or two.

- Printouts or downloads of recent lab results.
- Reports from scans — the written report matters even more than the pictures.
- Notes from any specialist you've seen for the same issue.
- Vaccination records, which often live in a separate place.

GOOD TO KNOW

Under today's rules, most results land in your portal as soon as they're finalized — sometimes before your doctor has called. Seeing a number you don't understand is normal; let your clinician interpret it rather than worrying alone.

IMAGING

17. X-Rays, Scans, and the Disc

The pictures travel differently from the paperwork.

Imaging — X-rays, CT scans, MRIs — is a special case. The written report usually moves with your records like any other document, but the actual pictures are big files that often travel on a disc, or through a special imaging-sharing system. A new doctor frequently wants both the report and the images.

- Ask the imaging center or hospital for a disc (or a digital copy) of the actual images.
- Ask for the written report too — it's the part most doctors read first.
- Some centers can send images electronically to another facility; ask if yours does.
- Keep any disc you're given; they're easy to request once and hard to recreate.

WATCH OUT

If you're handed a disc, don't panic about opening it yourself. Just bring it to the new office — they have the equipment to read it. Keeping it safe is your only job.

TIMELINES

18. How Long It Takes

Usually days to a few weeks — with a legal backstop.

People often expect records to move instantly and then fret when they don't. In practice it ranges from a day or two at a nimble office to a couple of weeks at a busy one. The law gives you a backstop: an office generally must act on your request within about a month, with one short written extension allowed if they need it.

- Portal downloads and shares are often instant — you don't wait at all.
- A faxed office-to-office transfer usually takes a few business days.
- A full paper copy mailed to you can take a couple of weeks.
- If it stretches past a month with no word, call and mention the request you made and when.

GOOD TO KNOW

State rules can be stricter than the federal one, never looser. If your office quotes a shorter timeline, that's the one that applies to you.

THE FEES

19. Fees, in Plain Words

Often free electronically; modest on paper.

Can they charge you for your own records? Sometimes, but only a reasonable, cost-based amount — and these days it's often nothing. When records go electronically through a portal, there's usually no charge at all. A fee is most likely when you ask for a big stack printed or copied onto a disc and mailed.

- A fee, if any, can cover the actual copying, supplies, and postage if mailed.
- They can't charge you just to search for or retrieve your file.
- Electronic copies through the portal are commonly free.
- Ask about any fee up front so a bill doesn't surprise you.

TIP

If a fee feels steep, ask for the records electronically or for just the part you actually need. Both usually bring the cost down — often to nothing.

PART OF IT

20. Asking for Only Part of the Record

You don't always need the whole mountain.

A lifetime of records can be hundreds of pages, and a new doctor rarely needs all of it. If you're seeing a specialist for one specific thing — your heart, your knee, your eyes — you can ask that just the relevant records be sent. It's faster, cheaper, and easier for the new office to actually use.

- For a specialist, ask to send only records about that condition.
- For a new primary doctor taking over your whole care, a fuller history makes sense.
- A date range — say, the last two or three years — is a common, sensible middle ground.
- You can always request more later if something's missing.

GOOD TO KNOW

The release form usually has a spot to narrow what's sent. If it doesn't, a note or a word to the records clerk does the same job.

MOVING AWAY

21. When You Move to a New Town or State

A bigger switch, the same steps.

Relocating adds a wrinkle: you may be leaving a system you can't easily drive back to. That makes your own copy more important than ever, and it makes doing the records request before you move — while you still remember the office names and have your logins — the smart play.

- Before the move, download everything from your current portals.
- Get the names and numbers of your current doctors written down.
- Once you've chosen new doctors, request transfers to them.
- Keep your old portal logins noted somewhere safe — you may still want them later.

TIP

Do the records gathering in the same box of chores as changing your address. It's far easier to reach an old office while you're still local than from three states away.

BOTH PORTALS

22. Keeping the Old Portal a While

Don't be in a hurry to let go.

When you switch systems, there's no rush to delete or abandon your old portal. It keeps showing your old records, and that's a handy reference while your new team gets up to speed. Think of it as the old house you've still got a key to — worth holding onto for a bit.

- Log into the old portal now and then to make sure you still can.
- Download anything you want to keep before the account goes dormant.
- Note your username and how you reset the password, in case you need back in.
- There's no penalty for having portals at more than one system at once.

GOOD TO KNOW

Old portals can eventually be retired by the system, especially after a long stretch of no activity. That's one more reason your downloaded copy is the version that truly lasts.

DOWNLOAD

23. How to Download Your Records From a Portal

The general path — labels vary by system.

Downloading your own records from a portal is usually just a few taps, though every system hides the button in a slightly different spot. The general shape is the same: find the records or documents area, choose what to download, and save or print it. I'll keep this general so it fits whichever system you're on.

- 1 Log into your portal on a computer — it's easier than on a phone for this.
- 2 Look for a menu like "Health Records," "Documents," or "Download My Record."
- 3 Choose the summary or the date range you want.
- 4 Save the file to your computer, or print it, or both.
- 5 Can't find the right button? Your provider's MyChart help page or the front desk can direct you.

TIP

If it's fiddly, this is a perfect thing to do together on a visit. We find the button once, save your records, and I'll show you where they landed so you can do it again next year.

THE FILES

24. The Files You'll End Up With

A readable PDF and a computer-friendly file.

When you download records, you may get more than one kind of file, and it's worth knowing which is which so you don't delete the useful one. Usually there's a PDF you can read and print like any document, and sometimes a second file meant for computers to read when transferring between systems.

- A PDF — this is the one you read, print, and file. Keep this.
- A health-data file (it may end in an odd set of letters) — this is for feeding into another system or app.
- If you only want something to read and keep, the PDF is all you need.
- If a new office asks for the computer-readable one, you'll have it handy.

GOOD TO KNOW

Don't worry if the computer-readable file looks like gibberish when you open it. It's not broken — it just isn't meant for human eyes. The PDF is your readable copy.

THE APPS

25. The Phone Health App Across Systems

One place that can pull from several doctors.

Here's a quiet advantage of the phone health apps: a single app can often connect to more than one health system at once. So even though each system has its own portal, your phone can gather records from the old system and the new one into one summary — a small bridge across the gap.

- On iPhone, Health Records can link several institutions in one place.
- On Android, Health Connect works with supported apps similarly.
- You add each system once; after that it updates on its own when you open the app.
- What it can pull depends on the system and app version — keep expectations loose.

TIP

Link your old system to the phone app before you lose touch with that portal. Then even after you've moved on, that history sits quietly in your phone.

FIX-IT

26. If the Records Don't Arrive

A calm checklist before you worry.

Sometimes you do everything right and the records still haven't shown up by the first visit. It's almost always a paperwork snag, not a lost cause. Work through it calmly and it usually clears in a call or two.

- 1 Call the old office and confirm they received and processed your request.
- 2 Check the fax number or address on the form was correct.
- 3 Call the new office to see whether something arrived but wasn't filed yet.
- 4 If you kept your own copy, bring it so the visit isn't held up.
- 5 Still stuck? That's exactly the kind of untangling I'm happy to help with.

GOOD TO KNOW

A missing transfer is a paperwork problem, not a health problem. If you feel fine, a delayed record is an annoyance to chase down, nothing to lose sleep over.

QUESTIONS

27. Common Worries, Answered

The things people actually ask me.

"Will my new doctor just see everything automatically?" No. Between different systems, records move only when requested. Ask at your first call whether they have yours yet.

"Do I lose my old records when I switch?" No. The old office keeps them for years, and your old portal keeps showing them. You just can't see them in the new system.

"Can they refuse because I owe them money?" No. An unpaid bill doesn't let an office withhold a copy of your records from you.

"Is it rude to take my records to a new doctor?" Not at all. It's your right and your history — doctors expect it and welcome it.

KEEP IT SAFE

28. Guarding Your Records and Your Numbers

The copy is powerful; treat it that way.

Your records hold sensitive details, so a little care in how you store and move them pays off. The same goes for your Medicare and insurance numbers, which show up throughout your records and are prized by scammers.

- Keep paper copies in a drawer or folder at home, not in the car.
- If you email yourself a copy, use your own private account.
- Shred old drafts and duplicate pages rather than tossing them whole.
- Give records only to offices you chose — never to someone who calls you out of the blue.

WATCH OUT

If anyone phones claiming they need your records or your Medicare number to "transfer your file," hang up. Real transfers go through your own doctors' offices, started by you — never through a surprise phone call.

PRIVACY

29. Who Can See What You Send

Your records go where you point them, not the world.

When you authorize a transfer, the records go to the provider you named and no one else. The release form you sign is what limits that — it names the destination, and often an expiration date and your right to cancel. Your records stay protected by the same privacy law at the new office as at the old one.

- You decide who receives the records by naming them on the form.
- You can cancel an authorization in writing before it's acted on.
- The new office is bound by the same privacy rules as the old one.
- You can ask either office for its privacy notice if you want to read it.

GOOD TO KNOW

Sharing with a family member is a separate choice from moving to a new doctor. If you want a relative to see your portal, there's a companion guide on setting up proxy access the proper way.

FOR THE HELPER

30. A Note for the Family Helper

If you're managing this for a parent.

If you're the adult child or spouse helping with a switch, a few things make it smoother. The records belong to the patient, so the release forms need their signature (or your legal authority), but you can be the one who keeps the checklist and chases the loose ends.

- Help gather the medicine list, allergies, and recent results before the first visit.
- Sit with them to download records from the old portal while the login still works.
- If you'll handle this ongoing, ask about proper proxy access to the new portal.
- Keep one master copy at home that you both know how to find.

GOOD TO KNOW

If your parent can make their own decisions, the forms go through them with their consent. If they can't, moving records goes through legal authority — a power of attorney or guardianship — and an ID check at the records office.

MYTHS

31. A Few Myths, Cleared Up

What's true — and what isn't.

"All my doctors share one big file." They don't. Each system keeps its own chart, and crossing between them means moving records by request.

"My new portal will have my old history in it." It won't, unless records are transferred and filed. A new system starts fresh.

"Getting my records costs a fortune." Usually not — electronic copies are often free, and any fee must be reasonable and cost-based.

"Only the doctor can request my records." You can request your own records yourself. It's your legal right.

MANY DOCTORS

32. When Several Doctors Are Involved

Each one is its own little transfer.

Many of us don't have just one doctor — there's a primary doctor plus a cardiologist, an eye doctor, maybe a specialist or two. When you switch, each of those is a separate record in a separate place. The job is the same for each, just repeated.

- Make a list of every provider you've seen and want records from.
- Handle the most important ones first — usually your primary doctor and any specialist treating an active issue.
- A release form at each office, or one new office requesting from all of them, both work.
- Check them off your list as each transfer confirms.

TIP

Your pharmacy and your primary doctor often have the most complete picture of your overall care. Starting there gets you most of the way in one or two stops.

WALK-THROUGH

33. A Walk-Through: Switching Systems

What the whole thing looks like start to finish.

Let's put it all together. Say you're leaving one health system for another across town. You book with the new primary doctor and, on that same call, ask whether they'll request your records or whether you should. You sign their release form, listing your old office and the records you want sent.

That afternoon you log into your old portal, download a copy of your records, and print the medicine list and recent results for your folder at home. You connect your phone's health app to the old system too, so a summary rides along. A week before the visit, you call the new office to confirm the records landed.

GOOD TO KNOW

Notice there's nothing technical or scary in that sequence — a phone call, a signed form, a download, a confirmation. That's the whole of it, and it's the same shape every time you switch.

CONFIRM

34. What to Confirm the New Office Received

Close the loop before the appointment.

A few days before your first visit, it's worth one short call to the new office to confirm the pieces are in place. It turns an uncertain first appointment into a smooth one, and it gives you time to fix anything that slipped through.

- Ask whether your records arrived and were filed in your new chart.
- Ask if anything they expected is still missing.
- Confirm they have your current medicine list and allergies.
- Ask what to bring to the first visit so you're not caught short.

TIP

Keep your own copy within reach during that call. If something's missing, you can often read it to them on the spot or bring it along, and the visit goes ahead as planned.

STAY CURRENT

35. Keeping It Current Going Forward

A small yearly habit keeps you ready.

The worst time to assemble your records is in a hurry, during a crisis or a sudden switch. The fix is a gentle yearly habit: once a year, refresh your medicine list, download anything new from your portals, and make sure your home folder still reflects reality. Fifteen minutes saves you a scramble later.

- Pick an anchor date — a birthday, New Year's — and tie the refresh to it.
- Update the medicine list first; it changes the most.
- Download any new results or notes worth keeping.
- Tell one trusted person where the folder lives, in case they ever need it.

GOOD TO KNOW

Keeping records current isn't about being fussy. It's a kindness to your future self and to whoever might one day need to speak for you when you can't.

YOUR RIGHTS

36. Your Rights Along the Way

You're in the driver's seat the whole time.

It helps to remember how much is genuinely in your hands here. These are your records and your decisions. No office can keep your history from you, and no one can move it without your say-so. That balance is there to protect you.

- You can get a copy of your own records, on paper or electronically.
- You can direct where a copy is sent, and name only who you choose.
- You can ask for all of it or just part, and in a form you can use.
- You can cancel an authorization, and switching never costs you the right to care.

TIP

If an office pushes back or makes it hard, slow down and ask for its records or privacy officer by name. And if you'd like a second set of ears while you sort it out, that's something I'm always glad to help with.

YOU'RE NOT ALONE

37. You Don't Have to Do This Alone

A friendly, patient person is one call away.

I hope this guide made moving your records feel a little less daunting and a lot more doable. Keep it in a drawer with your other home papers, come back to a page whenever you need it, and don't worry about memorizing anything. Nobody expects you to.

When you'd rather have a hand, that's exactly what I do. I come to your home, work at your pace, and never make you feel rushed or silly for asking. A first visit is a flat ninety-nine dollars, and for the parts that don't need me on-site I can often help right on your screen for less. Every visit comes with a 30-day, come-back-free guarantee.

I'm a patient tech helper — not a doctor, nurse, or your insurance company — so I stick to the technology: the apps, the logins, the cameras, the gadgets and getting them talking to each other. Anything about your health, your medicines, or what a number means, I'll always point you back to your doctor or nurse.

GOOD TO KNOW

When you call, I answer — or Sophie, my friendly AI helper, takes a message so nothing gets lost. Sophie isn't a runaround; she's just making sure I call you back.

TIP

Call or text me at (330) 200-8042, or visit BillsHomeTech.com. Serving Atwater and all of Portage County, with 30+ years of patient, plain-English tech help. If you're ever not 100% happy with a visit, I'll make it right or refund it. That's a promise. — Bill

CHEAT SHEET

Everyday Cheat Sheet

Keep this with your records folder.

- Your records don't move on their own — ask the old office, or the new one, to send them.
- A new health system means a brand-new portal and login; the old one keeps your old records.
- Sign a release form naming the new provider and which records to send.
- Always keep your own copy — download, print, and file the key pages at home.
- Before a first visit, bring your medicine list, allergies, and recent results.
- Electronic copies are often free; any fee must be reasonable; expect days to a few weeks.
- Nobody legitimate cold-calls to "transfer your file" — hang up on that and guard your Medicare number.
- Feeling truly unwell? Don't wait on paperwork — call your doctor, or 911 in an emergency.

AT A GLANCE

A Picture to Follow Along

How Your Records Follow You

From the old doctor to the new one — nothing moves until you ask.



Illustration - a schematic, not to scale. Your setup may differ.

AT A GLANCE

A Second Look

Old System vs. New System

A new health system means a fresh start — unless you move things over.

	Old system	New system
Portal login	Still your old one	A brand-new login
Your records	Stay in the old chart	Arrive only if sent
Message history	Stays with old office	Starts empty
Your copy at home	Yours to keep	Yours to bring

Illustration - a schematic, not to scale. Your setup may differ.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included.

Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: billshometech.com/book · bill@billshometech.com

This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.