

# Steps to View, Download or Send a Copy of Your Visit Record

Download visit file records of your office visits at Cleveland Clinic, and save them as PDF files on your personal device. You can then email the files to other healthcare providers, print them, or save them as copies for your records.

## Access Your Visit Record

- Access your visit record by logging in to MyChart<sup>®</sup> and selecting My Document Center from the "My Medical Record" from your menu.
- 2. Select Visit Records from the available options.

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My Document Center	to call the hotline first.

Document Center Please select the option that most closely matches the information you would li	is the information you would like.	
Visit Records Download and send visit summaries that would be helpful for a new provider, including details such as: Health Issues Medications Allergies Immunizations Plan of Care	My Records View records Request copi feature is no	
Release of Information Authorization Form Use this form to electronically submit a request for records that will be released via mail or secure email.		

3. Select the visits you would like to view, download, or send.

You have the option to select Single Visit, Date Range, or All Visits, or Lucy Summary.

The Lucy Summary can be viewed or downloaded. It is not your visit summary, but an overall portable copy of your allergies, medications, current health issues, procedures, test results, and immunizations from MyChart. If you choose this option, the directions to view and download are the same as choosing a visit.



#### **View Your Visit Record**

Select the **View** button to open a new window that contains a detailed summary particular to the visit you've selected. If you've selected multiple visits, each will show up in the area highlighted to select from and to view individually.



#### **Download Your Visit Record**

Select the **Download** button to download a file to your device.

- Select the **Download** button. Once the file downloads, you will be prompted to choose the directory or folder you wish to save to your device.
- Select the **Request** button.

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View Download Send

• Select the **Download** button.

• View the Download or the device directory folder you downloaded your file to and select the PDF listed within the folder.





When you download a PDF copy of your visit file, a .xdm file will also save to your computer. This is a "machine-readable" file that can be opened in most electronic medical record systems, but will not open on your personal computer.



### Send Your Visit Record

Select the **Send** button when you would like to send a visit summary (or multiple) to a specific physician that you've seen at another organization that is outside of Cleveland Clinic.

- Complete the fields as required to search for a physician.
- Select the **Search** button.
- Select and confirm the physician that you'd like to send your summary to and select the **Send** button.

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