HEM Health Expense Manager

How To Get Your Medical Records Into HEM

No typing. Download the file from your doctor's website, then choose it in HEM.

You can do this. If you can open an email, you can do this. Take it one step at a time. Each step tells you exactly what to click and what you should see.

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1. What you're getting (and why)

Most doctors and hospitals have a website where you can see your health information. It's called a **patient portal**. (You may know it as "MyChart" or "my patient account.")

Every patient portal is required to let you **download your records** as a special file. People can't read that file, but HEM can. HEM opens it and files everything for you: your visits, medications, allergies, test results, doctor's notes, and insurance.

You do this **once for each doctor's office or hospital**. Later, you can download again to bring in anything new. HEM never adds the same thing twice.

> **Tip:** Your records stay on **your** computer. HEM does not send them anywhere.

2. Before you start

1. **Make a list of where you've been seen.** Write down each doctor's office and hospital, for example "Dr. Smith's office" or "City Hospital." Each one may have its own website.

2. **Have your login ready** for each patient portal: your username (often your email) and password.
   Forgot it? On the portal's login page, click **Forgot username** or **Forgot password**. If you never signed up, call the office and say: *"I'd like to sign up for your patient portal."*

3. **Use a computer** (not a phone) for the download. The file needs to end up on the same computer as HEM.

3. Which website does my doctor use?

Log in to the patient portal and look at the top of the page for one of these names or logos:

MyChart

Says **"MyChart"** and often **"Epic"** in a corner.

Go to the MyChart steps →

Oracle Health / Cerner

Used by Dignity Health, CommonSpirit and many hospitals. Has a **"Results & Records"** menu.

Go to these steps →

athenahealth

Says **"athenahealth"** or **"Patient Portal powered by athenahealth."**

Go to these steps →

Something else

FollowMyHealth, healow, NextGen, eClinicalWorks, or a name you don't see here.

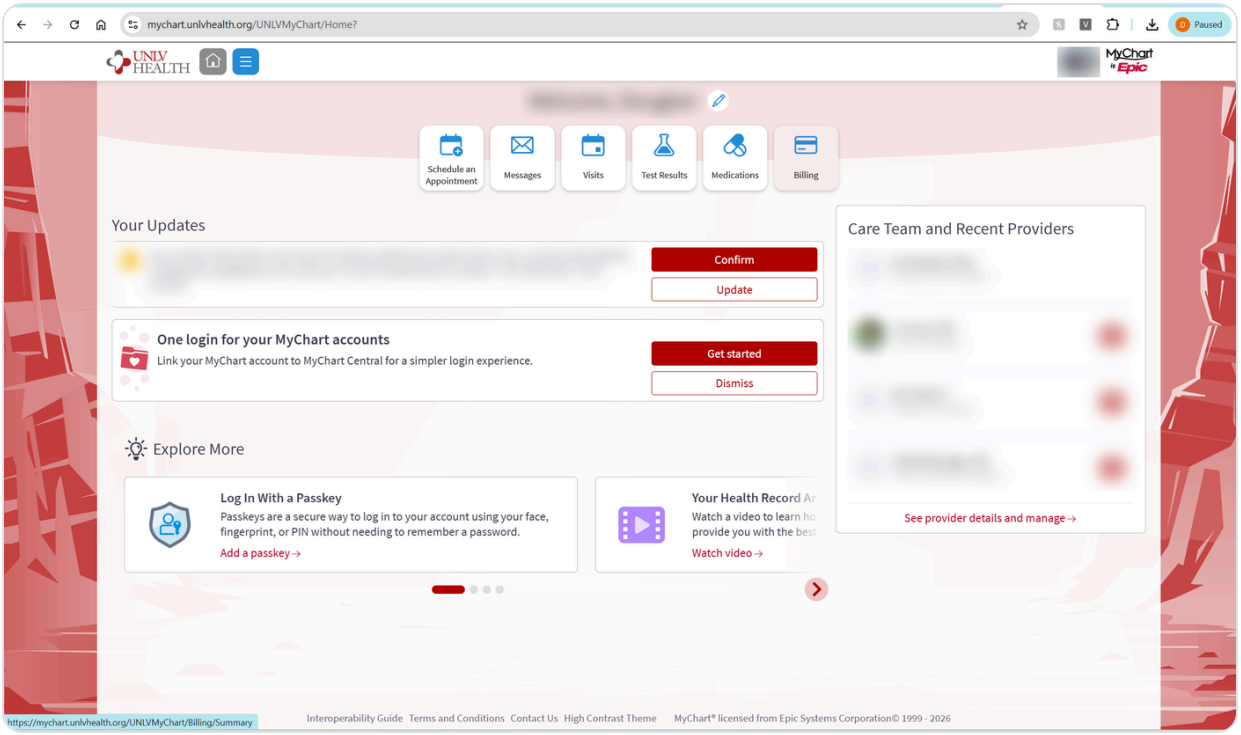
Go to these steps →

Tip: Not sure? Call the office and ask: *"Which patient portal do you use, and how do I download my records?"*

4. Download from MyChart

This example is from UNLV Health. Your MyChart may have different colors, but the buttons are the same.

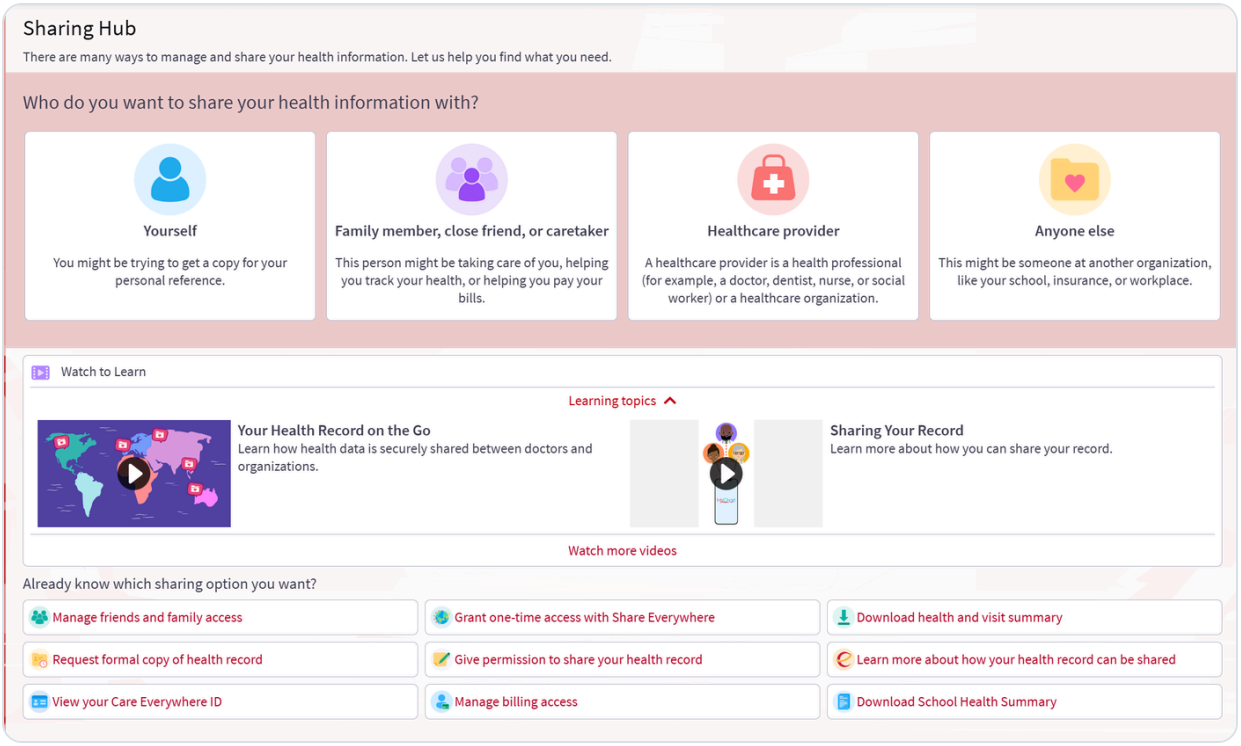
1. Log in to MyChart. Click the **blue menu button** ☰ near the top left.



The menu button is the blue square with three lines, next to the house icon.

2. In the search box at the top of the menu, type **Sharing**, then click **Sharing Hub**.
(If you don't see it, type **Download** instead and click **Download My Record**.)

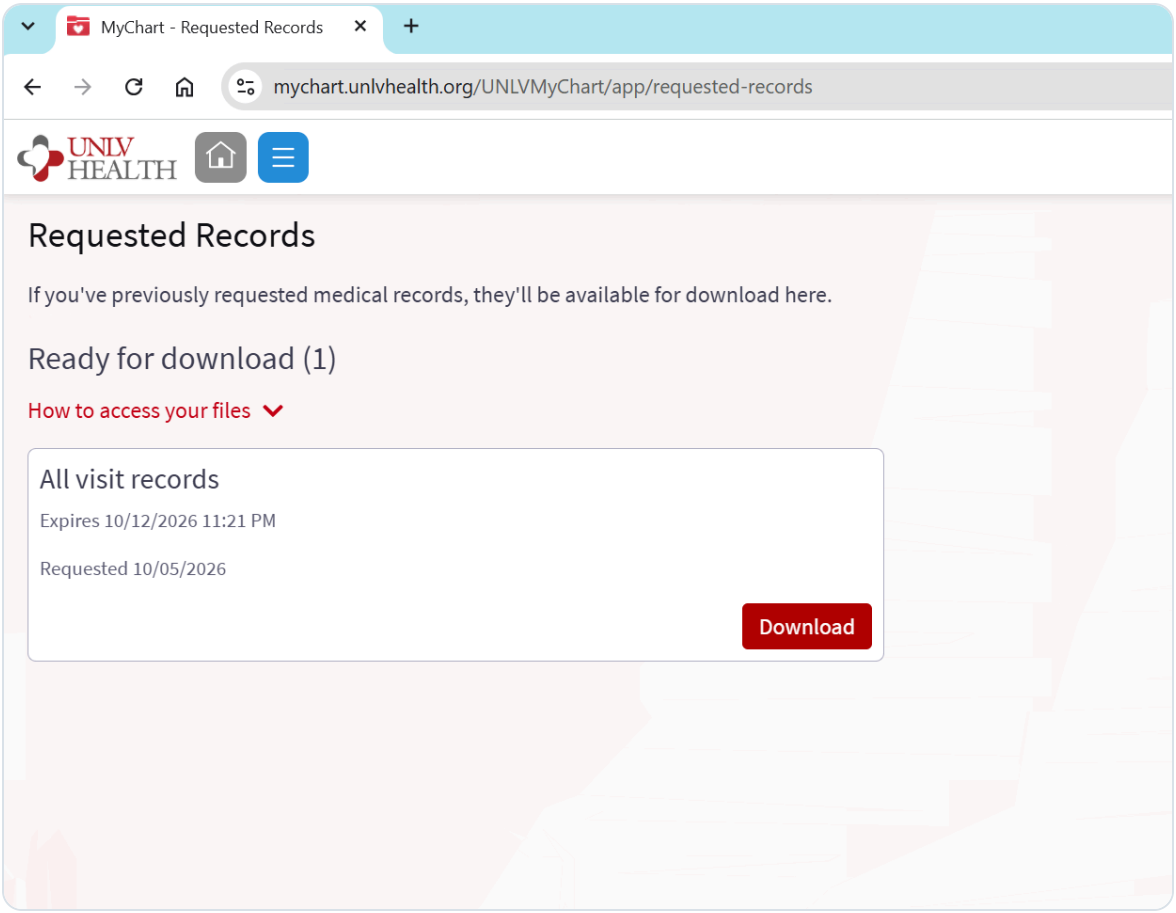
3. At the bottom of the Sharing Hub, click **Download health and visit summary**.



It's in the bottom-right corner, with a green arrow.

4. When it asks which visits, choose **All visits** (or the widest date range it offers). If it asks for a format, choose the one that says **XML** or **Both**.

5. MyChart may need a few minutes to get the file ready. It will show up on the **Requested Records** page. MyChart may email or text you when it's ready.



When it says "Ready for download," click the red Download button.

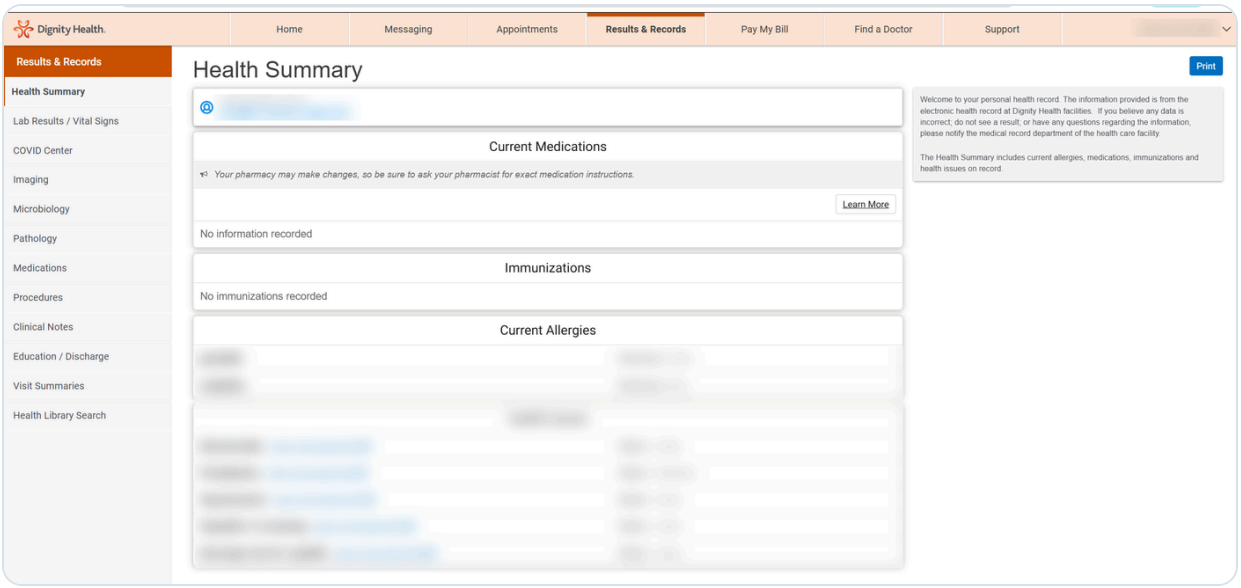
6 Click **Download**. A **.zip** file goes to your computer's **Downloads** folder.

> ✔ **What you should see:** A file with a name like **HealthSummary_Oct_05_2026.zip** in your Downloads folder.

Now go to Find the file on your computer.

5. Download from Dignity Health and other Oracle Health / Cerner sites

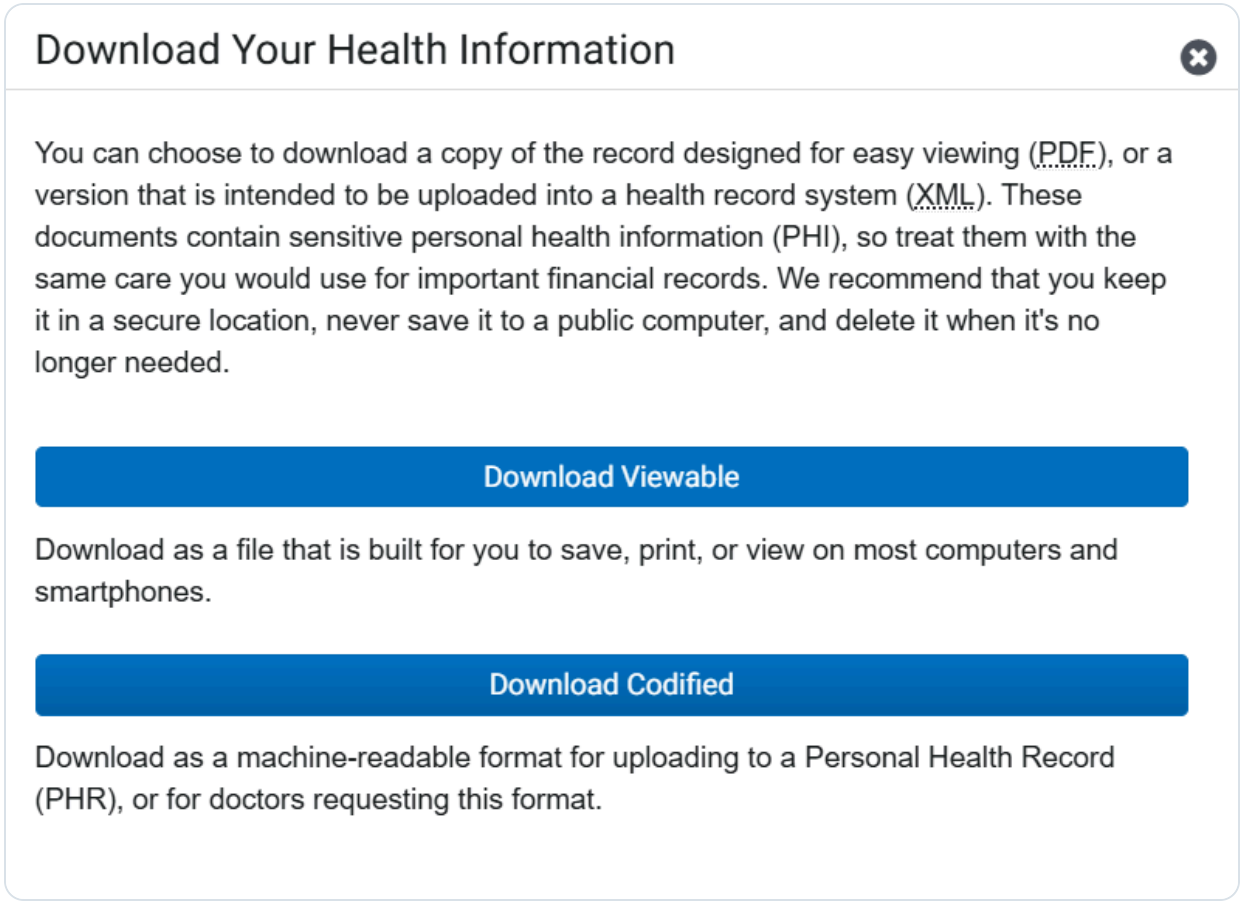
1. Log in to the portal. Click **Results & Records** at the top.



The left side has a list: Health Summary, Lab Results, Imaging, Pathology, Clinical Notes, Visit Summaries...

2. Click **Health Summary** or **Visit Summaries** on the left. Look for a **Download** button (sometimes it's next to **Print**, or on each visit).

3. A box opens called **Download Your Health Information**. Click **Download Codified**.



Choose **Download Codified**. That's the version HEM reads. ("Viewable" is a PDF for your eyes only.)

4 Save the file. If there's one download per visit, do this for **each visit**, especially hospital stays and surgeries.

> ✔ **What you should see:** A **.xml** or **.zip** file in your Downloads folder.

Now go to Find the file on your computer.

6. Download from athenahealth

1. Log in to the athenahealth patient portal.
2. Look for **My Health**, **Medical Records**, or **Health Record** in the menu.
3. Look for a button that says **Download**, **Export**, or **Data Portability**. Choose **all dates** if it asks.
4. If it asks for a format, choose **XML** or **Both** (not "PDF only").

   > ✔ **What you should see:** A **.zip** file in your Downloads folder, often with the office name in it.

> **Tip:** athenahealth portals look different from office to office. If you can't find the download, call the office and ask: *"How do I download my records as a C-CDA or XML file from your portal?"*

7. Download from any other website

Every certified patient portal has a download. It just goes by different names. Look in the menus for any of these words:

Look for...	Then choose...
Download · Export · Share · Health Summary · Download My Record · Data Portability · View, Download, Transmit · Continuity of Care Document (CCD)	**XML**, **C-CDA**, **CCD**, **Codified**, or **Both**, and **all visits / all dates**

> **Important:** If the only choice is **PDF**, that won't work for importing. A PDF is a picture of your record, not the record itself. Look again for XML, or call the office.

8. Find the file on your computer

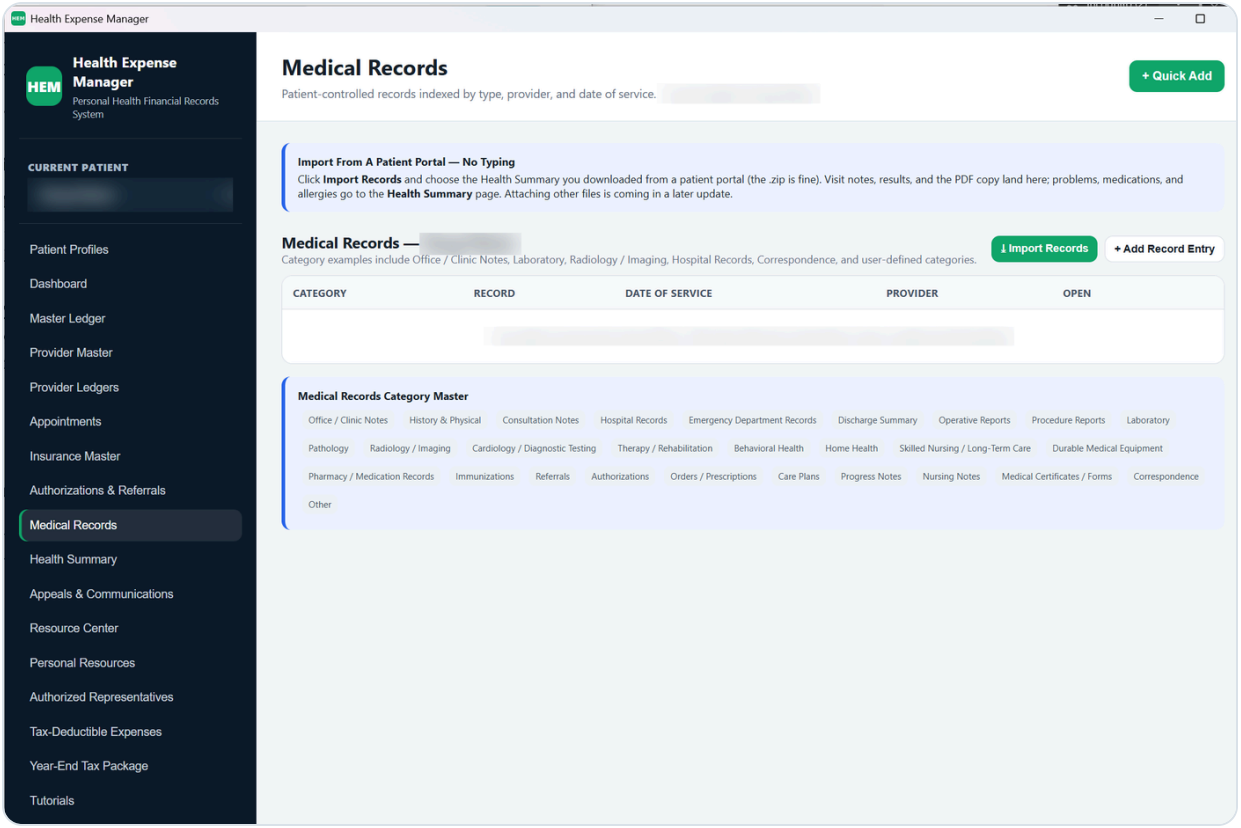
1. Your downloaded file is almost always in the **Downloads** folder.
2. **Don't open it and don't unzip it.** HEM opens it for you. A .zip file is fine exactly as it is.
3. Optional: rename it so you remember where it came from, like **UNLV records Oct 2026.zip**.

> **Tip:** Already unzipped it? That's OK. Open the unzipped folder and look for the **.xml** file inside (sometimes in a folder called **Document_XML** or **IHE_XDM**). Choose that .xml file in HEM instead.

9. Put the file into HEM

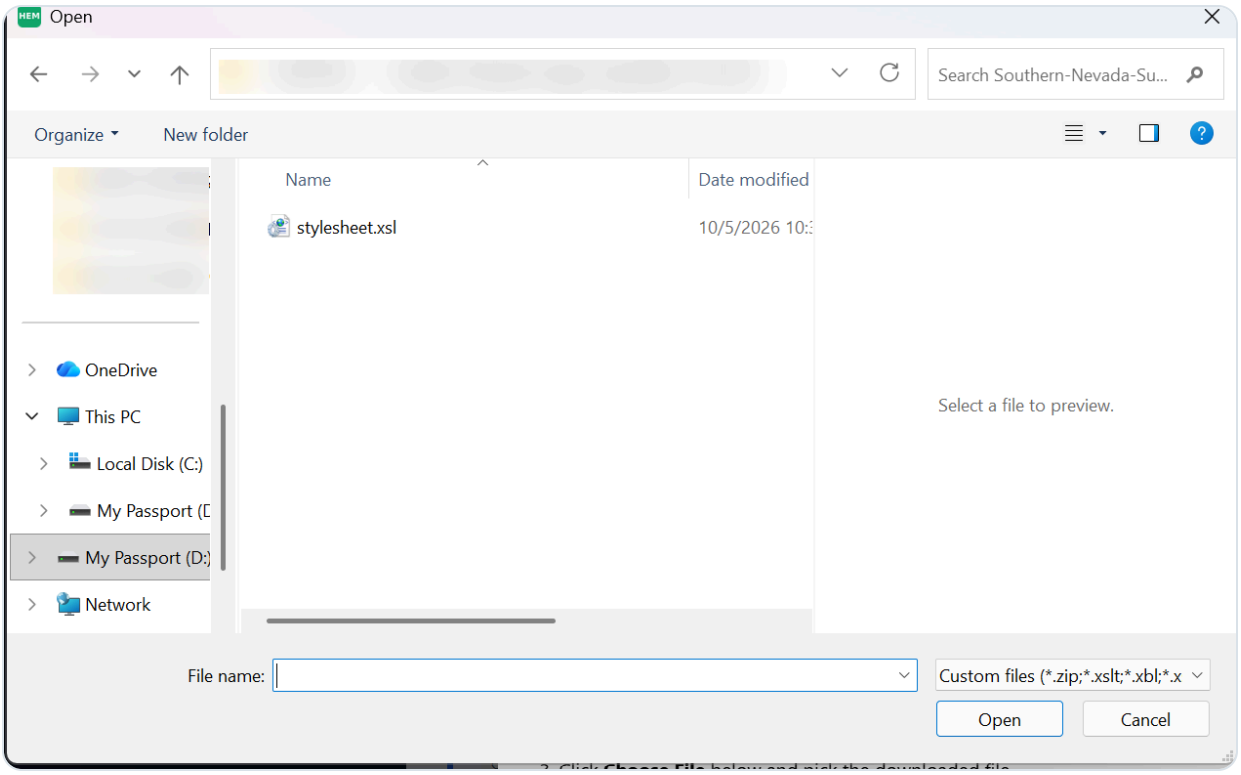
1. Open Health Expense Manager. In the menu on the left, click **Medical Records**.

2. Click the green **⤓ Import Records** button.



The green Import Records button is on the right, above the list.

3. Click **Choose File...**. A window opens. Click **Downloads** on the left side of that window, click your file once, then click **Open**.

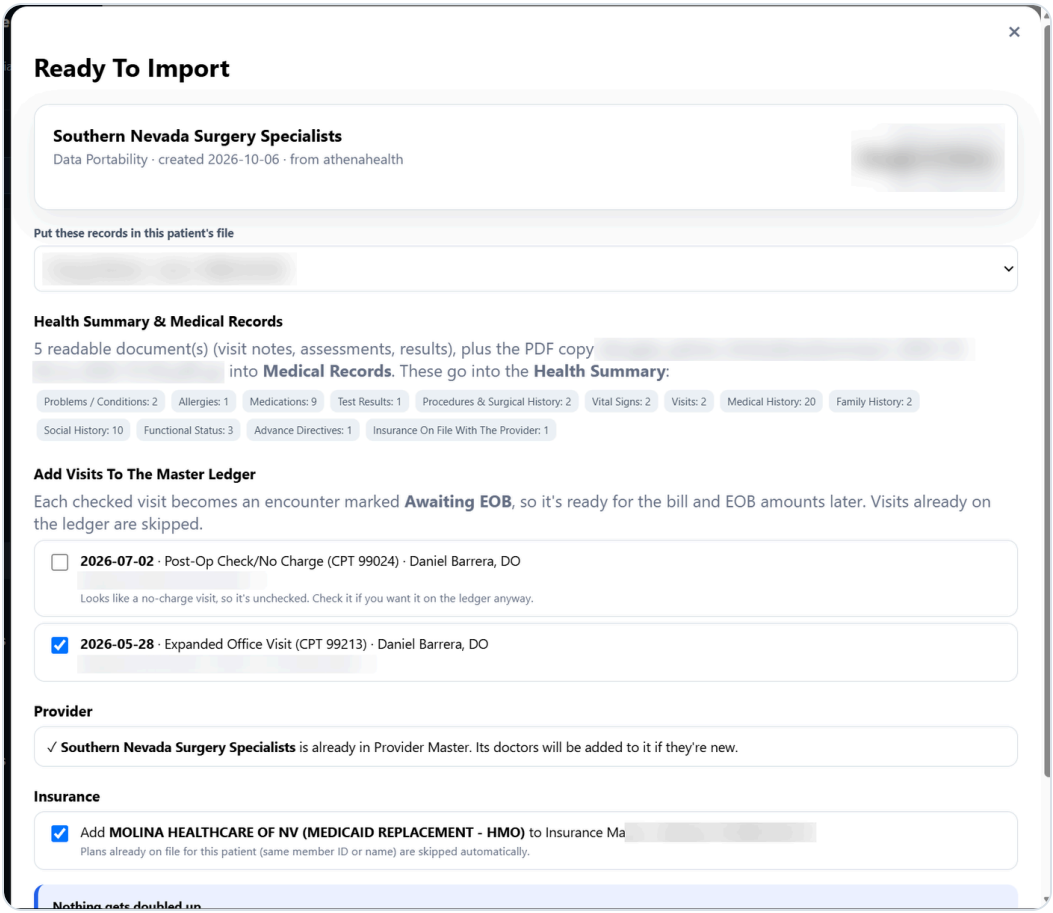


Pick the .zip (or .xml) you downloaded.

4

HEM reads the file and shows a **Ready To Import** screen. Check it:

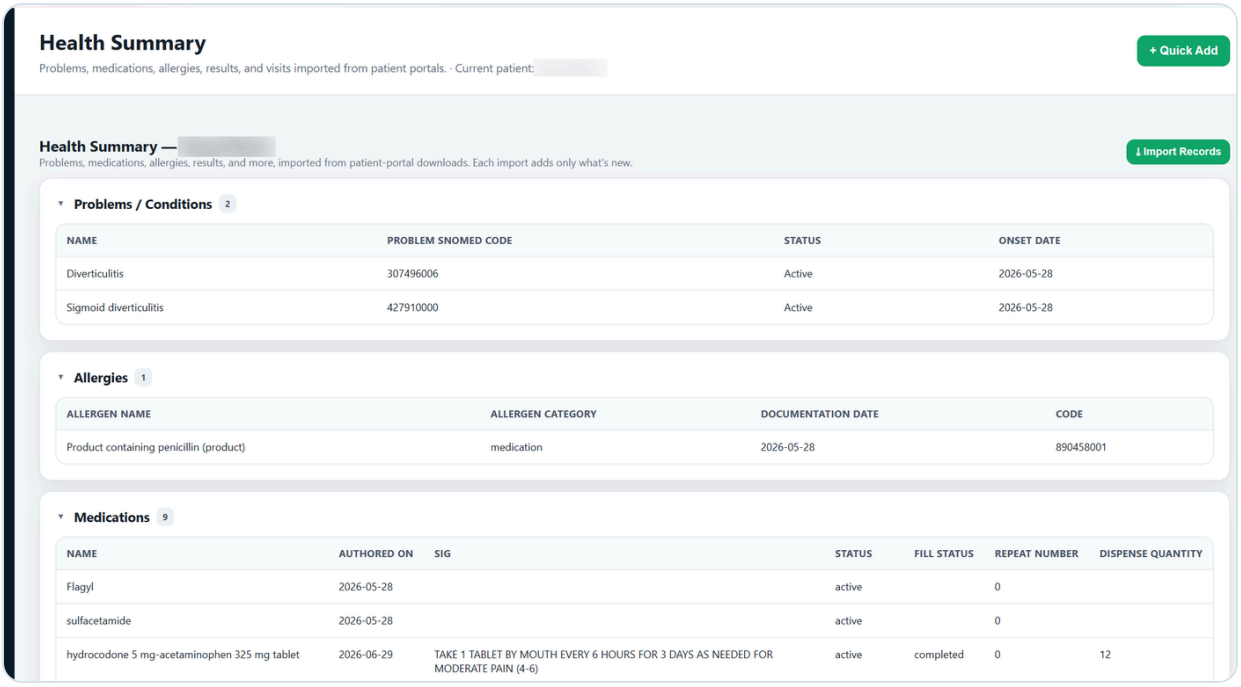
- **"Put these records in this patient's file"**: make sure the right person is picked. (If you manage family members, choose the right one.)
- **Visits**: checked visits go on your Master Ledger, waiting for the bill. Phone calls and refills are unchecked; they go to Communications instead.
- **Provider** and **Insurance**: leave checked unless they're already in HEM under another name.



Everything is explained on the screen. When it looks right, scroll down.

5 Scroll to the bottom and click **Import Into Health Expense Manager**.

> ✔ **What you should see:** A box that says **Records Imported** and lists what was added. Click **See The Health Summary**.



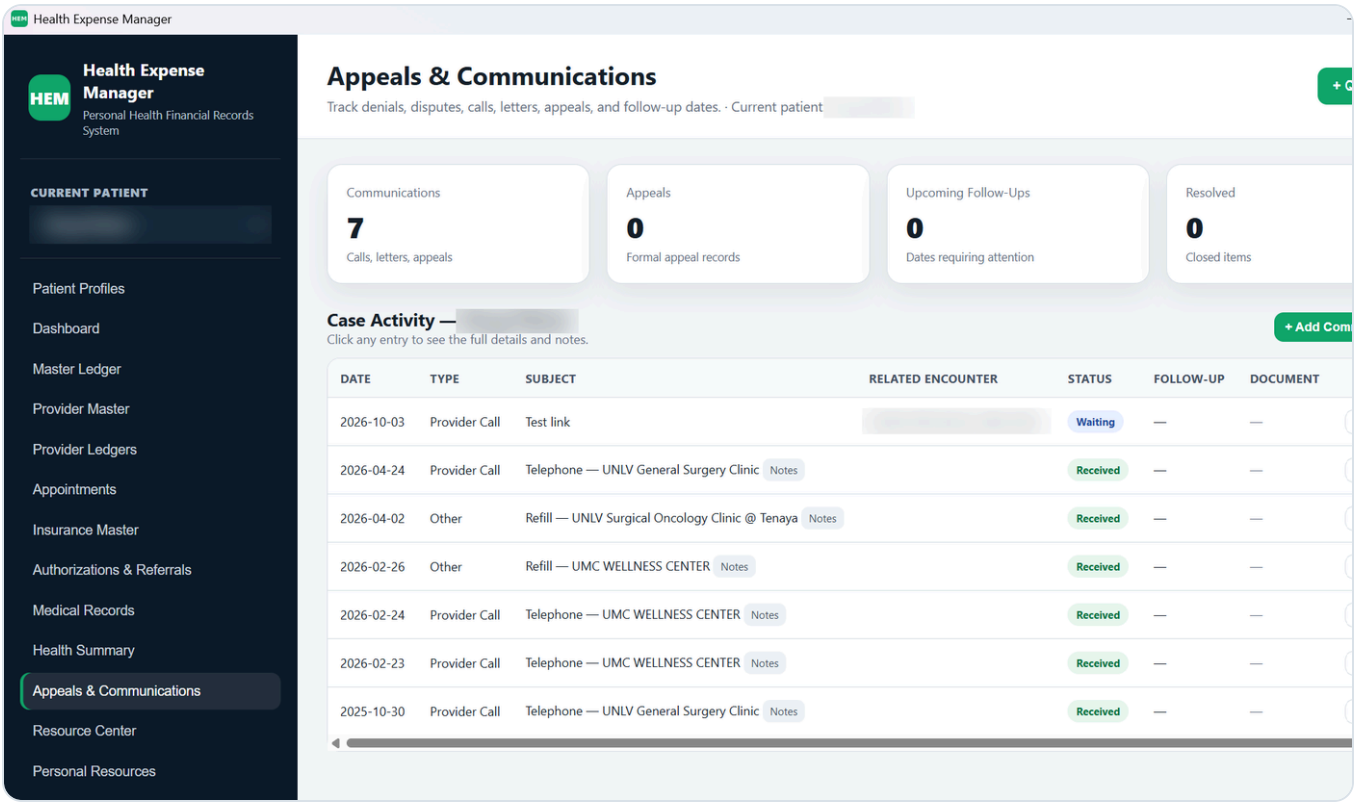
Your problems, allergies, medications and test results, all in one place. Abnormal results show in red.

6 Repeat for **every** doctor's office and hospital on your list.

Where everything goes

In HEM, click…	To find…
Health Summary	Problems, allergies, medications, test results, vital signs, history
Medical Records	Visit notes, hospital discharge summaries, lab and imaging reports (click **View**), and the PDF copy (click **Open PDF**)
Master Ledger	Each checked visit, marked **Awaiting EOB**, ready for the bill and insurance amounts
Appeals & Communications	Phone calls and refills, with the notes the office wrote

Provider Master / **Insurance Master**	The office or hospital, its doctors, and your insurance plan



Phone calls and refills from your records, each with the office's note. Click a line to read it.

> **Tip:** Changed your mind? On the **Health Summary** page, scroll to **Import History** and click **Undo This Import**.

10. If something didn't work

"No Health Summary Found"

The file you picked was a PDF or a different kind of file. Go back to the portal and download again, choosing **XML**, **Codified**, or **Both**.

I can't find the file

Open your **Downloads** folder. Click **Date modified** at the top of the list so the newest file is first.

The zip asks for a password

Some portals protect the file with a password they show or email to you. HEM can't open password-protected files yet. Unzip it with that password first, then choose the **.xml** file inside.

It picked the wrong person

On the Ready To Import screen, change **"Put these records in this patient's file."** If you already imported, use **Undo This Import** on the Health Summary page and import again.

My portal has no download button

Call the office and say: *"I'd like an electronic copy of my records as a C-CDA or XML file."* They are required to give you access to your records.

It's taking a long time

Large hospital files can take up to a minute. Don't close HEM while it says "Importing...".

11. What the download leaves out, and how to get the rest

A portal download is a **summary**, not your whole record. It usually does **not** include:

- **Bills**: charges, claim numbers, payments. Get these from the portal's **Billing** or **Pay My Bill** page, and your insurance company's **EOBs**.
- **Some full reports**: operative reports, pathology, or the full wording of imaging results. Look in **Clinical Notes**, **Pathology**, and **Imaging** in the portal.
- **Records from other places**: a surgeon's office download won't include the hospital where the surgery happened. Download from **each** place separately.

> **Tip:** You have a legal right (HIPAA) to your **complete** record, including billing records. Many portals have a **"Request formal copy of health record"** button. Or ask the office's Medical Records department in writing.

Screenshots are real examples. Personal details have been blurred. Your portal may look a little different.