



HOW TO SCAN YOUR PATIENT MEDICAL RECORDS IN 10 STEPS

So you've decided to go digital and scan your patient medical records. Paperless records are secure, easy to store, easy to access, easy to search and eco-friendly too. Attention to detail is crucial and each and every page must be captured when scanning medical records. So to help you, we've broken down the scanning process into 10 steps. (*We're assuming that your backfile records will be scanned to a PDF library and not into an EMR system, which is a separate process.*)

- 1** Ensure that each part of your scanning process (preparation, scanning, quality assurance) is fully documented. The Canadian Medical Protective Association requires it.



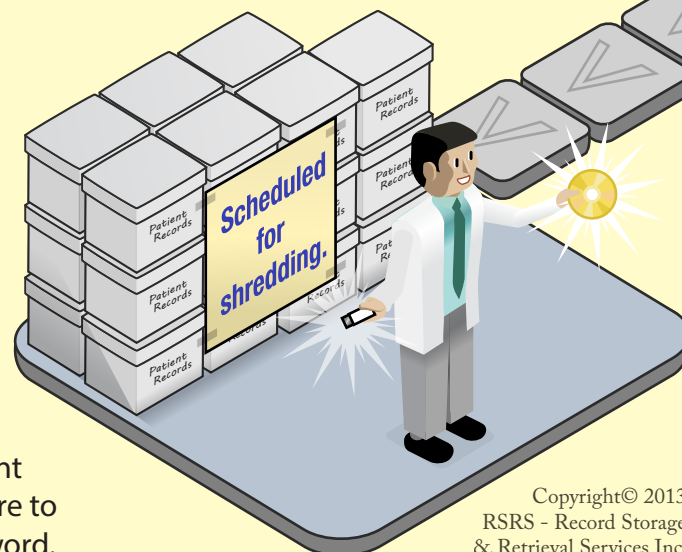
- 2** Select your Quality Control process in advance. We recommend ANSI Standard Z1.4 for on-the-spot image-quality verification and troubleshooting. (More info: <http://ow.ly/rAwGa>)

- 9** Perform quality assurance, (*which you set out in step 2*). We all know the old adage that you can't proofread your own writing and the same can be said for checking the quality of scanning. A *Quality Control Person* ensures that problems are discovered while the original documents are still available. After a batch of documents has been scanned, the *Quality Control Person* reviews samples for problems and quality issues. If problems are found, a solution is developed and either the unacceptable pages are rescanned or the entire batch is rescanned, according to the standards set out in your quality control plan. (RSRS follows the ANSI Standard Z1.4 Quality Control Plan.)

- 10** Count the digital files you've saved and ensure that figure matches the total number of files in your batch. Check each electronic file to ensure that the number of pages match.

Now celebrate! You've scanned your patient medical records compliantly and completely. Don't forget to back-up your data and store the back-up in a safe place.

NOTE: You may also want to utilize compliant OCR (Optical Character Recognition) software to make your scanned files searchable by keyword.



- 3** Include four index fields for each record. Ensure that at least one is unique. For example: Last Name, First Name, D.O.B., Unique Health Number. This information is generally available for match-and-merge from a data extract derived from your EMR or billing software (most accurate source).



- 4** Count all files in your batch and count every page in each file.



- 5** Separate the staples from all pages, then close the staple holes. Ensure every page has a straight edge, not jagged.



Cut a new edge as necessary. Tape down any post-it notes to a fresh piece of paper and tape down any pages smaller than a regular sheet of paper or purchase a jogger to align your pages for the scanner. (A good idea in any case.)

- 6** Face all pages the same way. We recommend the use of a jogger to properly align your pages for the scanner. Fanning the pages once prior to loading the paper will help to reduce double-feed errors.



- 7** Set your scanner to 300dpi. to ensure accurate replication. (You will still need to verify the legibility of documents such as ECGs & Growth Charts.)

- 8** Scan each file individually and name it according to your convention. Save it to a separate backed-up drive.

If not using "Match & Merge", manually enter the index fields for the file you have just scanned (e.g., Last Name, First Name, Date of Birth, Health Card #.)

RSRS is the Canadian leader in medical record and general document scanning. Our document bureau is outfitted with best-of-breed technologies and proven processes to ensure that the highest-quality scanned and indexed images are fully verified and delivered back to you promptly.

Call us at 1-888-563-3732, ext. 222 or visit our website, www.RSRS.com.