

Strategies for Transitioning Paper Records to RevolutionEHR

Overview

“What do we do with all of our existing patient records”? This is a question we field from virtually every one of our customers as they transition their practice to RevolutionEHR. Every practice that moves to an EHR system must be ready with a strategy to deal with their existing paper patient records. Most of our clients choose from two strategies that we recommend for transitioning paper charts to RevolutionEHR.

Strategies

Scan All Historical Records Immediately

Practices that choose this strategy have determined an immediate and complete transition of their paper records to RevolutionEHR is best for their practice. Most practices will hire temporary staff to complete the scanning of existing paper records into RevolutionEHR while practitioners begin the new workflow with RevolutionEHR for their patient encounters. Outsourcing is also an option for mass scanning as several firms provide record scanning services.

While scanning every record can be a significant undertaking, and may result in wasted effort/expense by scanning records of patients who will not be returning to the office, this strategy ensures access to all of the patient information from RevolutionEHR with no need to refer back to the paper records.

This strategy also results in an opportunity to recoup office space taken up by file storage equipment filled with paper records that no longer need to be on site.

Scan Historical Records As You See Patients

Practices that choose this strategy have determined a more measured transition of their paper records to RevolutionEHR is best for their practice. Staff will pull paper records and scan the items tagged by the doctor into RevolutionEHR either before or after the initial encounter in order to be available electronically for subsequent visits.

This strategy optimizes effort and expense by only scanning records that are needed going forward.

One benefit of waiting until after the visit to scan the records is for the doctor to have the familiar “old format” of data to refer to as they get used to the RevolutionEHR work flow. This strategy defers the benefit of going completely “paperless”.

Considerations

It may not be clear which strategy is best for your practice. Below are several topics to consider when choosing your strategy for transitioning to RevolutionEHR.

Amount of Data

The amount of data to scan from each medical record is an important consideration. Practices that have been in existence for a short period of time will have medical records which are smaller and will lend themselves to scanning the entire medical record for upload into RevolutionEHR. Practices that have decades' worth of medical records will not only have more medical records, they will tend to have much more data in each medical record. Whether to scan the entire medical record or just the more recent "highlights" of the record will need to be determined as a practice policy.

Not only will scanning an entire 60 sheet medical record (which will probably represent 120 pages of data) require quite a bit of time and storage space, it will also be difficult to navigate, and the utility of the data will be significantly diminished if it is too hard to navigate. For this reason, if the records are being scanned in after the initial "electronic" encounter, having the doctor spend 15 seconds indicating the essential information to scan from the record will not only save on personnel and storage assets, it will assure that the doctor has the portion of the medical record available if needed in the future.

Legal Concerns

Some practices consider destroying their paper records once they have been scanned into RevolutionEHR to save storage space and expense.

Before destroying paper records, practices should be aware that most states have laws that require files to be held for a specified time period – usually several years. Therefore, when destroying the original record is part of the strategy, it is important to scan the record in its entirety and upload the PDF into RevolutionEHR before destroying any paper versions of the record.

Office Space

Practices that are tight on office space or have immediate need for the space being occupied by paper records may be inclined to invest in the strategy of scanning all historical records into RevolutionEHR immediately and then destroying and/or moving the paper records off site to free up space.

Practices that have plenty of office space for paper record filing may be more inclined to scan the essential portions of the historical records in over time and continue to keep the paper records on site for reference.

Accessibility

Practices that need ubiquitous access to historical patient information from a variety of locations should consider hiring temporary staff to scan all patient records into RevolutionEHR immediately. This will provide doctors that practice from multiple offices or want to view patient information from home or when travelling access to this historical data.

Cost

Practices that consider hiring temporary staff to scan patient records into RevolutionEHR may be able to offset those costs by cost savings that are realized by reduced storage needs.

Summary

Transitioning your paper records to RevolutionEHR is a process that requires thoughtful consideration for each individual practice. While each practice is different, the two strategies we recommend are successfully implemented by most of our clients. While the best strategy may not initially be clear, it is important to move forward with planning your transition strategy. Doing nothing is not an option.