

Medical Records Provision
& Retrieval SOP

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PURPOSE:	To set out procedure for processes required to manage Medical Records notes provision at QE MR
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<ul style="list-style-type: none">• Essential Reading for:• Information for:	All Medical Records staff All staff who handle Medical Records as part of their role.

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1. Procedure Statement

- 1.1 The Queen Elizabeth Hospital site currently provide Medical Records electronically for Outpatient Department (OPD) appointments using the Clinical Portal.
- 1.2 For In-Patient admissions there is still a requirement for the provision of Medical records in paper format for all in-patient admissions.
- 1.3 The Medical records team provide records which are currently booked into Medical records locations only.

2. Automatically Generated Picking Lists

- 2.1 The pick lists are created by using the Pivot table created by the Informatics Dept. The lists contain Medical Records requests for future admissions TCI's and Ad Hoc requests. Urgent requests are submitted onto the Oceano system and followed up with an e-mail to the Medical Records in-box which is monitored daily by a member of the Medical Records Library Team.
- 2.2 The pick lists indicate where in the Medical records locations the records are booked to. For records booked to the Archive area the request is entered onto the Archive request list and the records retrieved the next working day.
- 2.3 Medical Records required by Moseley Hall Hospital (MHH) and West Heath Hospital (WHH) are requested via the Medical Records Library in-box and the records are collected by Trust transport and delivered directly to the site.
- 2.4 Medical records are booked out using the Oceano casenote tracking system to MHH and WHH. They are returned to the Library via Trust transport.
- 2.5 Medical Records for Ambulatory Care and Short Stay Unit are routinely requested using the Oceano system and the Medical Records inbox owing to the last minute additions to the TCI list.

3 TCI/AD HOC Procedure

- 3.1 The pick lists are generated and printed daily at the beginning of the morning before 8.30 a.m.

3.2 The dates will be set for the pulling would be the current day, the day before (for late additions) up to 8 days ahead of the TCI date

All Medical Records Requests booked to Medical Records locations will be pulled in one continuous action. Afterwards a series of lists are printed which breakdown the requests into location and volume.

These are then booked out to the location and bagged using the Trust approved Red bags and an address label of the location is printed.

The Bagged records are then placed in a cage ready for collection by Trust approved transport to the Post Room over at QEH.

Collection and drop off times are as follows

Mon-Fri	7.00 am collection only 10.00 am drop off and collection
OPD only (lists and labels)	13.00 pm
URGENT requests only	13:30 pm

Medical Records urgently required as an exception can be provided after this time.
3.00 pm collection and delivery

4 Unactioned/ Partially actioned requests

Any requests which have been unactioned or partially actioned will not appear on any list the Library are working with in terms of booking Medical Records to specific locations. Should a set of Medical Records be required and are not where they should be booked to . A Case notes activity report is run via the Health Informatics dashboard which will give a list of Medical Records filed by the member of staff in the Library team. This will be checked by the Supervisor. Should there still be no trace a temporary folder is created if appropriate or a wider check will be undertaken by the out of hour's team.

5 Out of Hours & Weekend Staff

Elliott Road service hours	6:00 am – 8:00 pm	Mon-Fri
	10:00 am – 15:00 pm	Sat-Sun

The out of hours team over the Weekend are primarily responsible for retrieving records for urgent admissions to Clinical Decision Unit (CDU), Admissions to Moseley Hall Hospital. The Medical Records for CDU are collected by non –patient and delivered the same day. The Moseley Hall requests are collected the next working day.

5.45 p.m-8.00 p.m. team complete the booking out and bagging up of Medical Records from the initial lists. In addition they will access the Create request screen and barcode folders required for additional volumes and new folders and send to the requester.

6 Medical Records returned to Elliott Road

6.1 Medical Records are transported throughout the Trust enclosed in Red bags and moved using cages. The cages are delivered to Elliott Road twice daily averaging 4-6 cages a day these are booked to Pre-File upon receipt and filed throughout the day. All cages **have** to be cleared daily.

7 Clinic Prep Process

7.1 Clinic Prep currently provides Appointment Lists and Labels for the following Outreach clinics. Woodgate Valley/Greenridge/Ashfurlong ENT / Cardiology and Dermatology services also Birmingham Women's Hospital Breast Clinic service: All clinic lists and patient labels are printed 5 days in advance .These are collected and delivered by Non-Patient transport the day before the clinic date.

7.2 All OPD clinics and services held at The Heritage Building/Nuffield House and QEH OPD clinics and services are provided with clinic lists and patient labels all clinic lists and patient labels are printed 5 days in advance. These are collected along once a day by Trust approved transport.

7.3 Medical Records are provided to specific Ophthalmology clinics in advance in order to enable information within the Records to be scanned onto the Medi-Soft and Clinical Portal systems.

7.4 These Medical records are sent to specific Medical Secretaries. Once this has been completed the Records are assigned a "Records Scanned "Label and returned to Elliott Road for filing.