



## MAKING OFFSITE RECORD RETRIEVAL FAST, EASY AND SECURE: SCAN-ON-DEMAND

HOW TAB HELPED PLANNED PARENTHOOD OF ILLINOIS  
IMPROVE OFFSITE RECORDS ACCESS



**TAB**

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### 1.0 Business Challenge: Offsite Record Access

Planned Parenthood of Illinois was dealing with some serious problems—whenever they needed access to files stored offsite, retrieval was becoming increasingly costly and time consuming.

When staff requested a record, they would have to wait for days to receive the file and often it would get lost in the mail. This not only compromised their ability to provide service to their clients, but it also opened them up to legal and compliance risks. The healthcare provider was also facing difficulty when it came to destroying records.

Planned Parenthood needed a better way to manage its retention schedules and control the growth of its offsite records collections. After careful consideration, the Illinois chapter partnered with TAB in order to develop a more effective approach to record keeping.

### 2.0 Assessing the Need

TAB met with key stakeholders from Planned Parenthood of Illinois' main facility in downtown Chicago to get a thorough understanding of their 17 branch locations' requirements. The healthcare provider was looking for a vendor that could:

- Provide secure offsite storage for its medical records
- Ensure easy and fast access to files as they were needed
- Destroy documents that had reached their disposal date as outlined in Planned Parenthood's retention schedule

It was also imperative that the proposed solution was cost-effective and efficient. Based on this information, TAB developed a customized offsite storage solution with a digital scanning and delivery package that would meet Planned Parenthood's offsite storage needs.

### 3.0 TAB's Solution: Scan-on-Demand

TAB's Scan-on-Demand service was the perfect fit for Planned Parenthood. The solution would allow the healthcare provider to store its sensitive records in TAB's HIPAA-compliant facility and access files quickly and easily in electronic form.

#### 3.1 How it works

Pre-authorized Planned Parenthood staff would be able to make a retrieval request either by phone or email and one of TAB's consultants would find the document, scan the record and check it for quality control purposes. The file would then be named using existing meta data from Planned Parenthood's functional classification system and sent to the requestor through a secure FTP site. Finally, the original patient file would be returned to the correct box.

*The Scan-On-Demand solution would alleviate the risk of documents getting lost in the mail and Planned Parenthood staff would be able to receive the files they needed in less than 24 hours, which was vital for providing excellent patient care.*

The Scan-on-Demand service would allow Planned Parenthood to:

- Protect patient confidentiality
- Receive files in real-time
- Image physical documents

The service was particularly appealing to Planned Parenthood because its previous vendor didn't have an on-demand scanning and electronic retrieval option. Furthermore, the solution would alleviate the risk of documents getting lost in the mail and staff would be able to receive the files they needed in less than 24 hours, which was vital for providing excellent patient care.

**THE TAB APPROACH:**

*TAB's consultants can work with you to develop a strong functional classification system that can be used to name both your onsite and offsite records. This will help make retrieval easy and consistent regardless of where your records are stored.*



*“TAB took care of all the behind the scenes work. We didn’t have to do anything!”*  
 - Brandi Steck,  
 Planned Parenthood  
 of Illinois

**4.0 A Implementing the Solution**

TAB developed a comprehensive plan to implement the Scan-on-Demand solution which included the following stages:

- Shipping the records
- Auditing the boxes
- Creating a secure site
- Determining access permissions

The plan was designed for a quick and seamless transition, with minimal disruption to daily business activities.

**4.1 Shipping the Records**

The first step of the engagement required transferring 3000 boxes of medical records from Planned Parenthood’s off-site location in Chicago to TAB’s HIPAA-compliant facility in Mayville, Wisconsin. TAB handled the entire transportation process and worked with the old service provider to coordinate the shipping and delivery.

Consultants checked the inventory upon arrival and prepared the boxes to be processed and eventually audited. “TAB took care of all the behind the scenes work. We didn’t have to do anything,” says Brandi Steck, Medical Services Coordinator & Community Educator at Planned Parenthood of Illinois.

**THE TAB APPROACH:**

*TAB’s Pack,Track and Move methodology can make the onerous task of moving your records simple and easy. Our consultants start by getting a detailed picture of your records collection.They can then perform our TAB SMART (Streamline. Manage.Access. Retain.Toss.) service to purge your collections of unnecessary documents. Finally, they pack all the remaining files into secure bins, barcode them for tracking purposes and facilitate the transportation process.*

*“The difference between our previous vendor and TAB is like night and day. This Scan-on-Demand system is amazing! A big step up from what I am used to.”*

#### **4.2 Auditing the Boxes**

Once the boxes were received and processed, TAB's consultants captured box level information by completing an audit. They started by cross-referencing the inventory to the upload, which outlined what needed to be retained and what could be destroyed based on Planned Parenthood's retention schedule.

The TAB team then:

- Destroyed files and documents that had reached their disposal date
- Assigned new barcodes to the boxes and cross referenced them to the existing ones
- Placed the boxes on their assigned shelves

The entire process was broken down into three semi loads and each load was sorted, barcoded and on the shelves in less than 48 hours.

#### **THE TAB APPROACH:**

*TAB's consultants have extensive expertise in developing retention schedules for a variety of organizations. They work with you to develop a comprehensive schedule that can help you successfully audit and purge your offsite records to control the growth of your collections and reduce storage costs.*

#### **4.3 Creating a Secure Site**

Due to the sensitive nature of Planned Parenthood's documents, it was vital that the records were delivered through a secure channel. TAB created a HIPAA-compliant FTP site that could be used by authorized staff at the 17 branches to access and download the imaged records.

Creating the site was simple—a TAB representative walked the head of Planned Parenthood's IT department through the process on the phone and the entire FTP site was up and running in less than an hour.

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**4.4 Determining Access Permissions**

Confidentiality is a huge concern when it comes to medical records. So to help protect the privacy of Planned Parenthood's patients, TAB worked with the healthcare provider to determine who could access the FTP site based on patient care and administrative duties and created a list of authorized users. Consultants would then confirm a requestor's authorization permissions before starting an internal work order for a retrieval request.

**5.0 Planning for the Future**

Planned Parenthood was extremely happy with the results of the engagement. "The difference between our previous vendor and TAB is like night and day," says Steck. "This Scan-on-Demand system is amazing! A big step up from what I am used to."

The Scan-on-Demand service provided staff with instant access to the files they needed through a secure channel. It also allowed them to:

- Cost-effectively store their sensitive documents in a HIPAA-secure facility
- Quickly and securely retrieve the records they needed in an electronic form
- Pay to image only the documents they needed
- Manage their retention schedules
- Prepare for their future RM plans

Going forward, Planned Parenthood has big plans for its records management program. TAB will work with the healthcare provider to scan and image all of their patient charts and create a secure database. The physical copies will be stored in TAB's offsite facility and staff will be able to search for specific record based on a variety of criteria including location, box content and file type. This will make retrieval requests faster and more efficient. The branches are also planning on implementing an electronic medical records software solution in the next year.

**Need Offsite Storage for Your Records? TAB Can Help!**

TAB has been working with the Planned Parenthood Federation of American for over a decade and we've helped a variety of branches with everything from filing and labelling to retention schedules and electronic content management systems.

So if you'd like to know if our Scan-on-Demand is right for you or if you need help with any other aspect of your records management program, [contact us today](#).