

## **MISL Case Study –Tiptree Medical Centre**



Tiptree medical centre

**NHS North East Essex**  
Clinical Commissioning Group  
Embracing *better health* for all



**MISL was pleased to be able to support Tiptree Medical Centre to scan in their Lloyd George patient record files and paperwork to free up space, reduce clinical risk and increase the efficiency of the surgery. Tiptree is part of the NHS North East Essex Clinical Commissioning Group (CCG) and is part of a rolling patient records scanning project that MISL is carrying out for 36 surgeries in the North East Essex area.**

### **The Challenge**

The key focus of the overall project as procured by the CCG was to assist the surgeries in freeing up the valuable space that was being occupied by paper medical records in surgeries. The paper records represented a risk in that they were the only copies of patient information, test results etc. and there would be significant efficiencies gained by allowing all authorised surgery staff to access the records centrally, and simultaneously, from within a digital system. Each of the surgeries have a variety of Electronic Patient Record (EPR) systems in place and the task was to scan in the documents for a patient, index them for the correct patient NHS number and then link them to the digital record for that patient within the surgery EPR system.

The other major challenge was the storage of the paper medical records. The record paperwork was stored in Lloyd George Wallets. Lloyd George wallets (see illustration) were introduced as appurtenances to the insurance-based "panel" scheme introduced under the Prime Minister David Lloyd-George (b.1863 – d.1945) when he was Secretary of State for Health.



The challenge with this traditional patient record storage method is that the wallets were originally designed to hold card inserts of the same dimensions. In modern times however most medical record paper work is output to A4 which means that it needs to be folded and stuffed into the wallets. This results in badly creased paperwork which requires a large amount of preparation prior to going through the scanning process.

### **The Business Case**

The Tiptree medical centre asked to be included in the CCG scanning project and were asked to justify their inclusion. In this section, with the kind permission of the customer, MISL has replicated part of the written justification from the surgery to provide additional context to this case study:

*“As room space has always been a problem for us, we have historically used locum GP’s on a flexible basis, as and when, so we can accommodate them to increase the shortfall of GP appointments we offer. Although this means we can offer the amount of appointments*

*required, patient satisfaction has continued to fall as this way of working does not offer patients the continuity of care they want.*

*As part of an improvement plan, which was agreed with NHS England, we have agreed to appointment a salaried GP to reduce our dependence on locums and improve continuity for patients. Recruitment has taken place and our new GP begins work with us on August 12<sup>th</sup> 2013. However, our problem with room space to house this essential additional clinical member of staff remains as difficult as ever. We are currently working on a daily rota and splitting shifts to ensure he can offer the full 8 sessions a week we require whilst not reducing other essential clinics.*

*With over 11,000 patients and approximately 15,000 hard copies of patients' records we are currently storing notes in 3 different rooms. Records are also now being stored in the corridor leading to the storage main room. With very limited storage within the premises equipment such as life support dummies, projectors and computer hardware is also stored in these rooms. Our Health and safety lead, Dr P Brown has identified these rooms as risks to the safety of staff who necessarily use them. "*

## **Project Design**

At the beginning of the process MISL held a series of scoping meetings to ascertain the scale of the project and the specific tasks that were required. The MISL project lead, Stuart Hawkins, first needed to educate the surgery team on the digitization process and help them to understand the work that was required at the customer end to get the records ready to be collected. This included helping the surgery team to understand the importance of the inventory for file retrievals purposes and also how the data would be returned to them and could be made accessible through their EPR system.

Once the project started MISL made sure that the surgery team felt supported through the process including answering questions and hands on help from the MISL project lead and MISL's production team.

## **The MISL process**

After the project was initiated MISL used the quantity assessment data from the surgery to assess how many document boxes they would need to pack all of their files for scanning. These boxes were delivered to Tiptree and within a few weeks the surgery had completed the packing of their files.

The MISL team carried out the following process on the documentation for each department:

- Collected the boxes of patient files and transported them safely and securely to the MISL processing site in Hoddesdon, Hertfordshire.
- Opened each box and checked the contents against the electronic inventory that was generated by the customer
- Prepared each file to remove bindings and staples where present and to ensure the paperwork was in the best condition for scanning. This included extensive works to unfold paperwork that had been stuffed into the Lloyd George Wallets.
- The scanning team then scanned each file using a manual feed scanning process. This involved viewing each image as it was scanned to ensure the correct image quality.
- The indexing team then indexed the files (as specified) by the information on the Lloyd George wallets.

- 10% of the boxes scanned then went through a further QA check where every page was manually checked against the scanned images in the entire box.
- All of the scanned images were processed by Optical Character Recognition (OCR) software resulting in a searchable, multi-page PDF file for each document or file.
- The final data was checked for accuracy a final time and then delivered to the surgery on an encrypted USB2.0 external hard drive
- MISL then stored the documents for a period of 3 months while the customer checked their data for accuracy.  
After a period of 3 months the customer authorised MISL to securely destroy the scanned and QA checked paperwork to the BS15713:2009 standard for secure destruction.

### **Conclusion**

The project was a resounding success for the customer in that there has been significant space made available in the medical centre along with providing instantaneous access to the digital documentation required to provide care to the patients attending the surgery. The customer's assessment of the project was as follows:

*“With the removal of the 11,000 patient records which amounted to over 13,000 files we have been able to create an administrative room with 4 desks. This reorganisation means no more hot-desking for administrative staff.*

*We can also accommodate other health workers such as the McMillan nurse, GP care Advisor and District Nurses who need to access our systems but previously had to return their bases, some 10miles away to do so.*

*We have also created a storage room so address the health and safety issues we had. We can store equipment and stock safely, in manner which his easily accessible.*

*We have achieved our aim changed an upstairs office into a consulting room. This gives us the badly needed clinical space we need. We will no longer have to plan our rotas around our accommodation but around our patient needs”*

MISL was pleased to be an integral part in this success for the customer and continues to provide the same high level of service to the remaining surgeries that are part of the project that is being funded and administered by the North East Essex NHS Clinical Commissioning Group.

### **Project statistics**

- Duration of the Tiptree Medical Centre project: 11 weeks
- Total number of patient record sets scanned: 11,150
- Total number of Lloyd George wallets scanned: 13,282 (many patient record sets had more than one Lloyd George wallet)
- Total number of images scanned: 962,553
- Scheduled completion date for all 36 surgeries in the project: May 2015
- Estimated total project value (for all 36 surgeries): £470,000 (excluding VAT)

### **Reference Contact details:**

Wendy Collett  
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**Stuart, can you please fill in Wendy's Address, phone number and email Address?**

**Many thanks,**

**Geoff.**

**MISL Contact Details**

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