MISL Case Study –Walsall Healthcare NHS Trust

MISL carried out a long term, modular document scanning project for Walsall Healthcare NHS Trust (Walsall) to assist with a complex challenge surrounding the rebuilding of the Manor Road Hospital in Walsall. MISL worked with the procurement department to design and implement the most efficient project to assist with all of the administrative departments moving into temporary accommodation. MISL had to design a process to capture the needs of the varying departments quickly so that documents could be shipped off for scanning

The Challenge

The initial contact for the project came from the procurement department at the Trust. The Manor Road Hospital was undergoing major redevelopment and, as a result, many of the surrounding buildings were being demolished. These buildings were home to the administrative departments of the Trust (as opposed to clinical services) and the staff were in the process of being relocated to surrounding temporary accommodation. The urgent call came because the hospital had planned and calculated for the movement and housing of the staff members but had not allowed for their paper documentation.

The challenge then was to scan in all the documentation to a workable digital surrogate so that the department paperwork did not have to be situated with the relocated staff.

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. It was clear that there was no real understanding of exact paper quantities or locations at that time and that therefore an assessment exercise needed to be undertaken.

The problem being that the first buildings were due to be demolished within 3 weeks of the first meeting!

MISL met with all of the departments that needed the service these were:

- Audit Committee
- Trust Headquarters
- Patient Advice And Liaison Service (PALS)
- Planned Care
- Clinical Assurance Committee
- Learning Centre
- Complaints Department
- Corporate Management Board
- Diet

- EBME
  Family Health Department
- Family Health and Diagnostic Division
- Member and Volunteer Services
- Infection Department
- Learning Centre Admin Office
- NVQ
- Occupational Health
- Planned Care
- Procurement

- Service Improvement
- Trust Board
- TEG

- TMG
- Undergraduate Education

In the meetings MISL gathered quickly that, while all departments intended to store their scanned paperwork in secure network drives for access, the way in which the files were accessed and retrieved on a daily basis varied from department to department. Also the paperwork was stored in a variety of ways in each department ranging from filing cabinets of various sizes to lever arch files and cardboard folders. It was going to take too long to define and quantify the task for all the departments before the demolition deadline.

MISL decided to build a simple template in Microsoft Excel to allow each department to count the number of files, filing cabinet drawers etc. that they had in their offices. This was circulated and filled in over a couple of days. The template, using accepted averages of pages per drawer, file etc. generated the total number of files and images per department. The spreadsheet also calculated the costs for the end to end scanning process for each department by multiplying the totals by the unit prices as per MISL's Eastern Shires Purchasing Organisation (ESPO) framework agreement. This enabled each department to see what their scanning budget needed to be.

After budgetary sign off the departments were visited a further time by MISL to define how the files were to be indexed. This was carefully designed so that the department personnel were able to access their files in the same way digitally as when they were in a paper form.

The MISL process

After the project was initiated MISL used the quantity assessment data from each department to assess how many document boxes they would need to pack all of their files for scanning. These boxes were delivered to each department and within 1 week many departments had completed the packing of their files.

Each department was treated as a separate customer by MISL because their needs were so varied.

Each department had its own production specification and indexing criteria, some files required scanning per file, some per file divider and someon a per document level for example.

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

- Opened each box and checked the contents against the paper 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
- 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 or document (as specified) by the information on the file covers, spines or documents.
- 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 each department via encrypted USB thumb drive.
- MISL then stored the documents for a period of 1 month while each department checked their data for accuracy.
- After a period of 1 montheach departmentauthorised MISL to securely destroy the non-scanned and QA checked paperwork to the BS15713:2009 standard for secure destruction.

Conclusion

The project was a resounding success for the Trust in that all the departments' paper work was scanned to the highest quality and was immediately available for use by the various teams in an electronic form. The Trust did not have to find a solution for storing the paperwork and the entire process was completed so quickly that none of the departments missed their deadlines for relocation.

The project was another example of MISL's experience in generating a creative solution for a difficult challenge. The quantity assessment tool was a quick method to garner an understanding of the project scale and costs without a detailed information audit. Also, by treating each department as a customer in their own right, MISL were able to ensure that the files and documents were scanned and made accessible in the same way digitally as they had been in a paper form. This approach dramatically increased adoption and kept any negative impact of the transition from paper documentation to digital documentation to a minimum.

MISL is still working with the Trust on a variety of projects including an assessment of the best way to digitise all of the Trust's medical record files.

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