Case Study

County Durham and Darlington NHS Foundation Trust (CDDFT)
Restore Information Management
Document Management Solutions (390)

The Customer

County Durham and Darlington NHS Foundation Trust (CDDFT) is one of the largest integrated care providers in England, serving a population of more than 600,000 people and offering further community services to more than 1.2 million people. Restore has been providing record management services to CDDFT since 2013.

This contract was to manage the digitisation of the Trust's records, with the overall targets of achieving the following:

- Make immediate cost savings
- Standardise the existing record archive to maintain industry standards in all locations
- Achieve paperlite operations throughout the Trust
- Efficient and clear processes for accessing digital records
- A system allowing for effective collaboration across departments to enable more productive records management

The Requirement

Providing excellent, efficient patient care is a priority for the Trust. For medical staff to provide the best possible care, they need quick and easy access to patient medical files to support making holistic, accurate diagnoses and ensure optimum health outcomes.

Prior to partnering with Restore, patient files were stored in different filing systems across five locations, all of which were at capacity. With over 890,000 paper-based records stored across these sites, CDDFT wanted a centralised digital system to enable clinicians to rapidly retrieve and transfer medical files at the point of care.

To ensure all the Trust's goals could be achieved, Restore was required to uplift, consolidate, and scan a high volume of medical records on-demand whilst also safeguarding patient data and maintaining the quality of care provided. The Trust required a seamless, cost-effective transition, ensuring that all staff within the Trust could continue to access all necessary documents and resources, with an average 2,000 file retrievals performed daily.

The Solution

While the overarching aim for the Trust was to become paperlite, this would require scanning many legacy records which were not required to support patient care. This would not be a cost-effective solution, as scanning these records would incur additional costs without providing benefits to the Trust. To empower a more cost-effective solution, Restore used a two-stage process:

Stage One – Physical Storage

Restore worked with the Trust to gain a full understanding of the existing archive. They engaged with the Trust's existing records management employees, acting in a consultant position to support in achieving the following:

- Developing a full understanding of the archive, allowing for identification of records essential for digitisation.
- Implementation of records management system, O'Neil, including correct application of barcoding technology across the archive to allow for accurate, live tracking of all records.
- Consolidating the archive where possible, minimising the overall required storage space.
- Uplift of records, where required, to either Restore's off-site or alternative Trust premises.
- Implementing industry-best standard for record storage to increase the longevity of paper records.

Stage Two – Digitisation

While the physical storage solution was optimised and implemented, Restore worked alongside the Trust to develop the specification for the management and storage of electronic patient records. The Trust required a fully electronic Clinical Document Management System across all clinics within the Trust. Our specialists worked alongside the Trust to ensure a system was developed to classify documents within the System in alignment with Trust requirements. This ensured all records were searchable for the Trust using pre-agreed criteria to support uptake of the system.

The database was then developed using a combined approach to ensure records would be digitally accessible when and where needed across the Trust. This approach was developed to minimise overall costs while maintaining efficacy, and comprised of the following aspects:

- Scan-on-demand: physical records which were requested following a certain date were sent for scanning, ensuring they were available digitally.
- Day-forward scanning: records were immediately scanned upon creation from the contract go-live date, supporting immediate access to new records across the Trust.

To support the roll-out of the digitisation programme, Restore installed two cutting-edge scanners within the Trust's warehouse facilities, allowing for on-site scanning. They also provided training to the Trust's existing warehouse staff, ensuring these employees were cross-trained and able to continue providing records management services to the necessary level. This allowed for the full development of a BS1008 certified database, ensring security and accessibility.

> **"Restore Information Management has saved us money and vital space for clinical care. We now have quicker access to patient information, providing the patient with a better experience."**
>
> Mark Herkes, Head of Health Records, County Durham and Darlington NHS Foundation Trust

The Results

The physical element of the project commenced took nine months to complete. Restore now stores a total 43,500 boxes across 45 departments at our facility. These patient records are predominantly legacy notes, stored and then destroyed in line with the retention policy. Boxes are consolidated to optimise space usage.

The transfer to digitising commenced at 2,000 files per day, and within twelve months, Restore scanned 366,000 patient files.

Record retrieval volumes have reduced significantly since the on-demand scanning go-live and are now at approximately 42 files per day – saving significant expenditure.

As a result of the project, CDDFT gained a centralised electronic system which has given medical staff quicker access and transferability of patient information, improving the speed of decision-making. The coordination of care and support between health providers has improved, providing the patient with a better experience. Staff costs were reduced with savings reinvested into patient care. Real estate was repurposed for more productive frontline patient care services, and data security improved with fully auditable databases that comply with data governance.

Restore also significantly reduced the temporary labour costs for CDDFT and their internal transportation costs. They are now provided with monthly management information reports and service metrics, giving them a full audit of their patient's records.

Key facts:

- 890,000 files stored in the trust facilities
- 37.9m pages scanned
- Initial requirement of 2,000 patient files scanned per day; after 8 years, reduced to 42 files scanned per day
- Any urgent requests scanned and received by trust within 3 hours

For further information relating to optimising records and cost-effective digitisation, please find Restore's white paper on the subject here: https://www.restore.co.uk/informationmanagement/resource-hub/insights/whitepapers/how-healthy-is-your-patient-information/

To find out how ESPO's Document Management Solutions framework (390) can support you with your digitisation project, please contact the ESPO team at ICT@espo.org.