Medical Record Digitisation Processes

Any project to digitise medical records via scanning will involve some of the following processes and techniques.

Bulk scanning – also known as archive scanning. The scanning of a large archive of records over a short period of time, usually for the purpose of closing a storage facility or library.

On-demand scanning – The scanning of records just before they are required, for example in advance of an outpatient appointment or admission. ie on a 'just in time' basis.

Forward scanning – also known as day forward scanning and ongoing scanning. The scanning of newly created paper documents relating to patients, usually after an attendance or admission, and adding these to an existing digitised record.

On-exit scanning – The scanning of records after they have been used, usually after an attendance or admission, in effect combining on-demand and forward scanning. In practice, this technique is rarely used.

e-forms – Forms within a patient information system (typically an electronic document management system) that allows clinicians to enter data, thereby avoiding the use of paper for subsequent processing through forward scanning. The more advanced e-form technology includes workflow management tools.

b-forms – Barcoded paper forms that clinicians use to record information about patients. The barcode contains information about the form to allow consistent indexing without manual intervention when processed through on-demand or forward scanning.

Restructuring – The process of changing the structure of a record when scanning eg moving from a medical record with x tabs or separators to an electronic medical record with y tabs or separators.

Indexing – The process of adding metadata to a document to enable it to be viewed in the correct section or to be found in a search.

Smart indexing – The process of automating the indexing process, usually via optical character recognition.

Deep storage – The storage of paper based records that are not frequently accessed, in boxes in a large storage facility. The records are not filed in racks and not moved around individually, which reduces storage costs.