

Laserfiche ECM Blogs

The Prescription for Record-Keeping Headaches

Education



Written by Laserfiche Staff



Monica Baccardax, IT Project Manager for the Faculty of Medicine at Dalhousie University Medical School, in Halifax, Nova Scotia, Canada, finds Laserfiche a solid improvement over the school's old system of managing records with paper and custom software applications. Relying on custom databases and spreadsheets was fine—as long as a programmer was available to keep the system current. Laserfiche is not only much quicker and much more reliable, but gives her many more options to collect, store, search and import data.

Not that she wants to reinvent the wheel. "The Medical School has been collecting student and resident records for many years," she says, "and has developed a workable filing method. Rather than change something that works well for them, I created the Laserfiche system to follow their method."

The structure mirrors the filing hierarchy and classification codes that were already in place, so that staff can easily find information.

"At first employees were resistant to change," says Baccardax, "and could not see the value of having scanned documents. But when they realized the Laserfiche serves as a backup should documents be destroyed, they no longer worried about losing paper documents. Once employees saw how easy Laserfiche was to use and that it could be tailored to reflect their workable filing system, the word spread to other employees. Now new departments are taking interest in getting their documents scanned."

Baccardax has paid attention to developing best practices as well, right down to scanning methods. She experimented with different colored paper and ink to clearly demonstrate the difference in clarity to users and help them develop good scanning

techniques. She also determined what would be sacrificed in speed and storage space when scanning in color. The school found that black-and-white scanning was clearer and faster and, because the school pays for nightly backup and color files take up more disk space, much more cost-effective.

Laserfiche gives staff speedy access to records, which comes in handy when, for example, an MD applies for a job in a hospital setting and the school needs to verify her records. "Before we used Laserfiche it could take a lot of time to fill verification requests," Baccardax recalls. We would have to find the material in the file folder or retrieve it from off-site storage. With Laserfiche, the employee can quickly find the student or resident records to fill the hospital's request. We scan the verification information so it can be used again for future requests."

Using Laserfiche has helped the school clarify just which information is vital and who is responsible for it. "As a result," notes Baccardax, "the departments were able to clear a great number of paper documents, which made their filing much more manageable and freed up a lot of storage space.

"For new employees," she continues, "it clarified the role each employee had with respect to information gathering. It also opened the communication lines among departments sharing information by addressing the grey areas concerning who is responsible for what information. It elucidates where the information stopped and started between departments. And employees became more aware of the amount of information that an organization actually obtains during the course of the day."

The school also takes inventory of its records to see which ones are crucial. Baccardax notes, "After careful review with record inventory, we realized that a small percentage of information is actually vital. While record inventory may seem like a time consuming task, it is actually a time saver because it reduces the need to scan redundant information."

Laserfiche was particularly useful for the school when the provisions of the Freedom of Information and Privacy Protection of Privacy Act. (FOIPOP) was extended to universities in Nova Scotia. Says Baccardax, "Certain types of information could not be shared unless approved by an authorized person. Laserfiche enables you to set the access rights so that information is available only to authorized staff. In addition, the Laserfiche redaction option serves as a useful tool to black out any information that cannot be shared with unauthorized personnel."

Baccardax notes the ease with which she compiles the information she needs. She has set up a search function, for example, to help her record the number of pages the

school has scanned in for the month. She can import it into an Excel spreadsheet and run reports to calculate the numbers.

Future plans include moving to a Web-based system, to get each department scanning in its own records and easing the workload on current scanning staff. “First, we must have the policies and procedures in place for each department. Upon departmental approval, the plan is to select and train an employee who can act as custodian of the departmental information. Once training is completed, our next phase will be to have each department to scan its own documents. Our scanner will then have more time to complete archival records and rush jobs.”

When asked what tips she’d give to other universities, Baccardax replies, “Educate, educate, educate. I cannot emphasize enough the importance of educating the employee about how to make the best use of paper and electronic documents, so they can achieve good quality images in a timely matter. Removal of staples, paper clips, tapes, consciousness of types of color pens and markers being used, color or photo copy papers—all play a role in the quality and speed of scanning.

“Get approval and commitment from higher level before proceeding with records management,” she adds. “Upon approval, create a Records Management Committee to include one person from each of the appointed departments, an archivist, and a lawyer. Each will offer insights that will enhance the Laserfiche system.”



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