

## HPEI RIM - PREPARING RECORDS FOR STORAGE

### SUPPLIES CHECKLIST

- Permanent markers (preferably black)
- Storage boxes
  - ◆ Must be one cubic foot in size
  - ◆ Have a double strong bottom
  - ◆ Have a detachable lid
- Sticky notes
- Scotch tape

### PREPARING THE CHARTS CHECKLIST

- ◆ The following items must be removed:
  - paper and bulldog clips
  - elastic bands
  - metal chart fasteners
  - sheet protectors
  - laminated items
  - CDs & SD cards
- ◆ Is the front cover of your chart identified?
  - Place a patient demographic label
  - OR**
  - Write two identifiers, preferably name and PHN



## PREPARING THE BOXES

### PREPARING THE BOXES CHECKLIST

- ◆ How are the charts organized in the box?
  - Alphabetically
  - PHN
  
- ◆ How much does your box weigh?
  - no more than 23-25 pounds
  - 4 inches (one hand width) of space in the box will ensure each box is the proper weight
  
- ◆ How have you identified each box?
  - Apply an identifiable label (sticky note)
  - Example: Deceased 2018 Box 1
  - Add a piece of Scotch tape to secure the sticky note
  - Do **NOT** write directly on the boxes

### Completing the Box Inventory

- Request inventory template from [healthpeiRIM@ihis.org](mailto:healthpeiRIM@ihis.org)
- Complete fields in electronic inventory template for each file in each box:
  - Make sure the files are listed in the exact order on the inventory sheet as they are in the box**
  - Identify the volume if more than one volume exists (e.g. Vol. 1-3 of 3)
  - Document the year of Last Active Date **OR** Date of Death, not both
  
- Email completed inventory(s) to [healthpeiRIM@ihis.org](mailto:healthpeiRIM@ihis.org)
  
- RIM will review the inventory(s) and respond with the final version containing RIM assigned box numbers
  - Save this final version and delete all previous versions

## PREPARING FOR TRANSFER (After RIM Approval)

### PREPARING FOR TRANSFER CHECKLIST (After RIM Approval)

- In black marker:
  - Write RG42 to the left of the box handle
  - Below RG42, write the RIM assigned box number (see picture)
- Place two copies of the final version of the inventory list in the matching box
- Limit access to these boxes to ensure charts have not been removed or added
- If charts are reactivated and removed, update the paper copy as well as the electronic copy of the inventory
- Once RIM receives approval for boxes to go to the Records Centre, a Records Shipping Form (RC03) will be emailed and RIM will contact the Department of Transportation and Infrastructure (TI) for pick up
- Print two RC03s and sign both copies
- Tape the RC03s to the top box of the group being shipped
- Before TI picks up the boxes, take this opportunity to double check that the contents of the box match the inventory list. The Records Centre has strict criteria that must be met, or the boxes will be returned
- At this point, only the permanent identifying markers (RG42 and the RIM assigned box number) should be on the box
- TI will sign both RC03s upon pick up
- Keep one copy of the RC03 and scan it to [healthpeiRIM@ihis.org](mailto:healthpeiRIM@ihis.org)

