

# Patient Notes Digitisation Guide for GP Practices

with Restore Digital

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Your medical records taken care of

[www.restore.co.uk/digital](http://www.restore.co.uk/digital)



# About Restore Digital

## Who we are

At Restore Digital, we help organisations go digital faster with market leading document scanning, management and digital workflow services. We're leading the way in business digitalisation for a more sustainable, adaptable and thriving economy. We're part of Restore PLC, and as a group we work with 55,000 organisations across public and private sectors, including 85% of NHS organisations, helping them achieve their paperless targets.

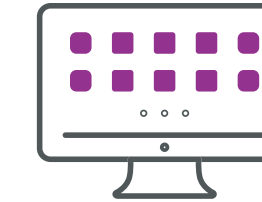
## What we do in healthcare

We provide medical record scanning and digital document management services to the NHS. With the most advanced healthcare scanning technologies on the market, we're helping the NHS go digital faster, transforming thousands of paper records each month.

When it comes to GP note digitisation, we're the experts in transforming sensitive, often fragile paper records into complete digital records, that are integrated into care systems.

We're the leading scanning provider of Lloyd George records, and we've digitised paper records for over 350 GP practices, across 40 CCGs.

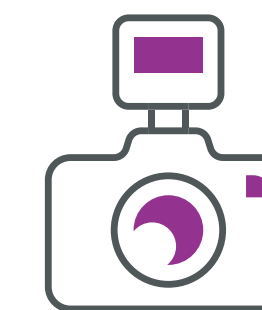
Stats from 2018 to the end of 2022



**6.15 million LG folders**



**4.1 million patient records**



**396 million images**



## About this guide

As the leading provider of scanning for GP patient notes, we've put together this guide to help you understand the services we offer and how we can support you when it comes to digitising your patient records. Please feel free to share this guide with anyone in your organization who will be involved with your digitisation project.



If you'd like to discuss your GP notes scanning requirements with us, get in touch:

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Primary Care Lead at Restore Digital



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## What is GP patient note digitisation?

GP patient note digitisation involves the bulk scanning of all your hard copy patient notes, making them available in digital format with the potential for uploading these as episodes into your clinical system.

Our scanning service supports both A4 folder and the more common Lloyd George patient file folder types.





## What are the benefits?



### Save space

You'll free up valuable space in your practice, enabling you to maximise your practice footprint with additional clinic or meeting spaces.



### Save time

Having patient records available digitally saves valuable appointment time and improves point of care decision making.



### Reduce record risks

Digitising your patient notes immediately removes the risk of complete loss of records by potential disasters such as fire or flood.

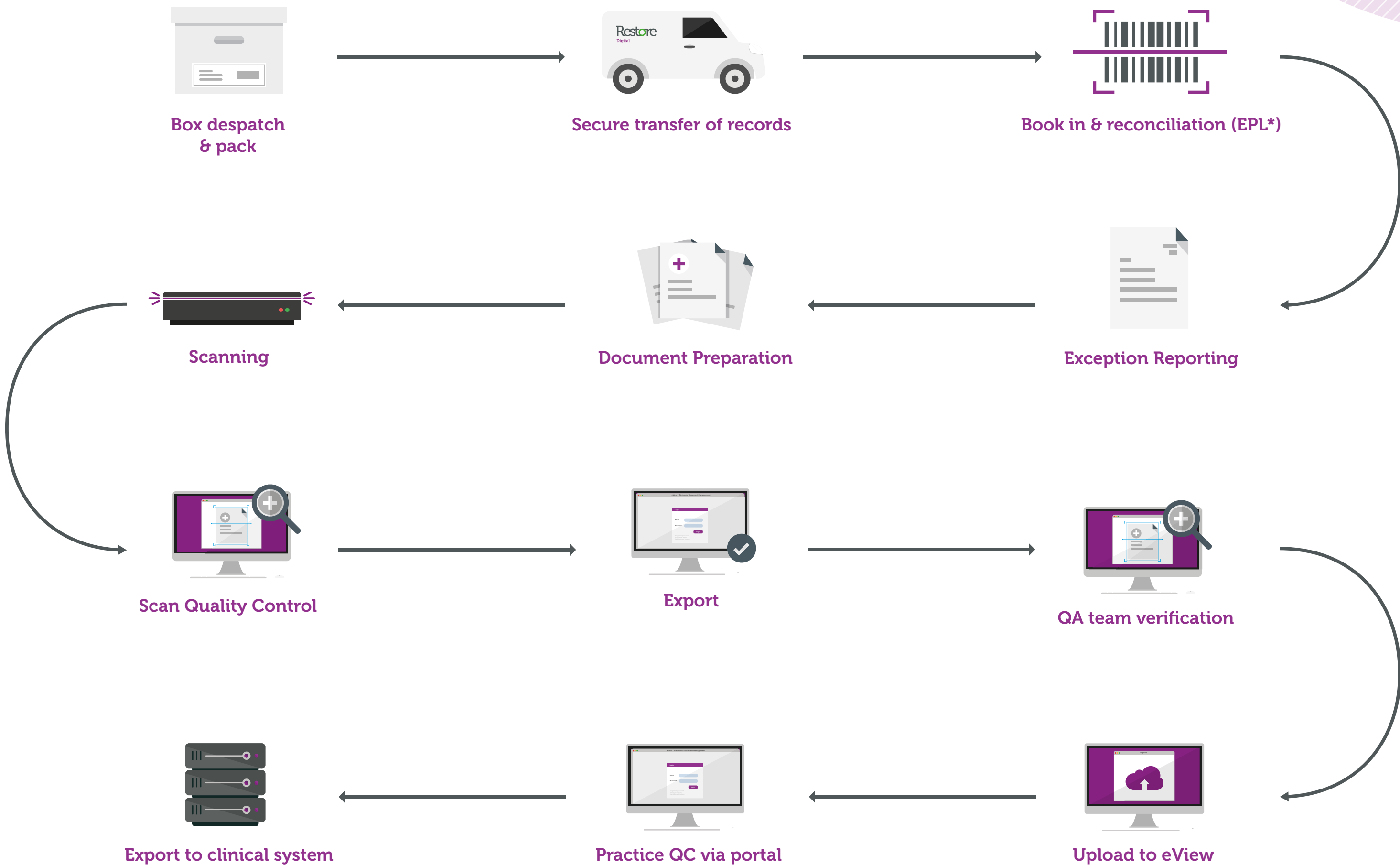


### Reduces cost

Digitising GP notes removes the need for costly records storage facilities, as well as the costs associated with paper record retrieval.

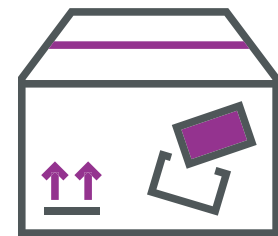
## The Digitisation process – how it works

The main stages are outlined on the following pages, along with key activities and things for practices to consider.



\*Electronic Patient Listing

# Packing your patient records



## Choose your packing process

One of the first decisions a GP practice needs to make is whether they'll pack the records using practice staff, or if they need to outsource this to a scanning service provider.

At Restore Digital we have an experienced GP record packing team that can take care of this process at your practice swiftly and securely, to take the burden off your practice staff. We'll arrange packing dates that are suitable for the GP practice and take care of providing all packing materials ready for the packing process.



## Validate packed records

Whether you're packing records with practice staff or with Restore Digital's packing team, a validation process is required to be carried out to ensure all records are verified before being sent for scanning.



## Document packing exceptions

It's important to identify any exceptions in the packing process to ensure safety and accuracy of records. Each box is verified against a patient master list, which is based on the active patient list from your clinical system. If any additional patient files are present, or any that were expected are missing, they'll be noted and reported to you, along with anything that isn't scannable in a single, easy to understand report.

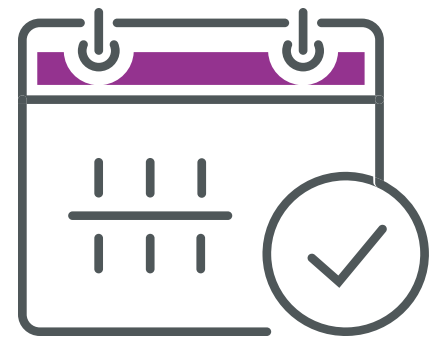


## Transporting packed records

We operate our own fleet of GPS tracked and branded vans. All our drivers are fully security vetted, carry photo ID and wear uniform. Once the packed boxes have been checked and securely sealed, they're loaded onto the vans by our staff and will proceed immediately to the allocated scanning centre.

Our teams work with practice staff to ensure we arrange for collections or deliveries to take place at times that work for the surgery.

# Preparing your records for scanning



## Planning Key Dates

Our project team will work with your nominated practice lead for scanning to agree and keep you updated with key milestone dates and progress throughout the digitisation process for your records. This starts at collection and covers scanning, quality control, returning items to you, and Upload and Destruction Sign-Off. The duration of scanning can vary depending on how many records your practice has and we will always work with you to ensure we plan activities that work for your practices.



## Barcode tracking

Every box that arrives at one of our scanning centres has a unique box barcode label attached to it that allows us to track the box and all its' files from the point of collection through scanning and validation, to destruction. This ensures we can locate a box anywhere in the warehouse or within the scanning process stages at any time.



## File Book-In and Prep

Prior to the scanning process, each file is booked into our systems and physically prepared to make sure the condition of the records are suitable for scanning. Things like removal of staples or treasury tags, straightening out folded corners, or sorting rolled up or bunched documents within the wallets are all done by our team to take the burden off your practice staff.





# Record Scanning



## Lloyd George wallets and contents scanning

The Lloyd George wallets and their contents are scanned separately. Wallets are scanned using specialist upright scanners which easily capture thick, concertinaed folder types. The records are scanned using state of the art, high speed scanners. All scanning operators are highly trained with each one always following the same operating procedures.

Once complete, the scanned Lloyd George wallet scan and document contents are digitally combined within a single PDF.

## Scanning Quality

All scanning is undertaken to the National Specification for Lloyd George GP Notes Scanning. That is currently at 300 DPI, black & white with OCR.

## Scanning outputs

### Original Document Quality

The scanning of any documents which are in very poor condition or difficult to read in their original state (for example, a photocopy of a photocopy) will be what is seen and replicated in the digital output. Poor quality of legibility of written contents, or physical paperwork quality will not be improved from the original into the scanned copy.

### Orientation and Page presentation

Pages will be scanned in the order they present in their files and our staff will not remove or re-order documents. We use scanner software that auto-rotates pages if they can be detected, but this doesn't work across hand-written notes or very poor quality documents and so some pages within the electronic files may require rotating within document viewers in the clinical system.

### Multiple Patient Files

If a patient has multiple file folders holding their records, (2 Lloyd George pouches for example) then these will be delivered as 2 separate PDFs.

### Scanning Exception Report

Once the scanning process is complete, we produce a master summary report that documents for the practices any variances between the original box inventory listing(s) and what was physically receipted and scanned. This is known as a Scanning Exception Report. The report details any Additional unaccounted-for files or file count variances, and is shared with the practice to review at the same time the digital files are uploaded to our document management portal eView for checking by the practice.

### Scan on Demand

When your records are with us for scanning, you may have a critical need to access patient records in an emergency. Restore Digital can retrieve these records with our Scan on Demand service (SCOD). In this instance, the patient's record is priority scanned and emailed to a nominated requestor within an agreed timeframe with the practice.

# Returning your records

## Return and acceptance

### Return of physical wallets, files and non-scannable items

Due to legislation, Lloyd George wallets remain Crown Property and cannot be destroyed. The empty wallets are returned to the practice and are dispatched with an accompanying manifest list.

It's also not uncommon for Lloyd George files to contain non-scannable items such as CDs, floppy disks, X-rays, microfiches and plastic separators. Any of these non-scannable items found in a file are returned to the practice detailing the NHS number of the patient they relate to.

### Acceptance of digital records

You'll have a small number of Quality Control (QC) boxes returned to assist with the acceptance stage, where you'll need to compare the hard copy files in the nominated QC boxes against their respective digital versions.

Your nominated QC files will be available to view on our electronic document management portal, eView. When you've received the corresponding physical files you'll have 10 working days to review and sign-off the sample digital files in eView.

If you're planning on uploading the digital records in bulk to your clinical system (which Restore Digital can also provide), formal acceptance must take place for the upload to be initiated, as digital files cannot be queried once they have been uploaded to clinical systems.



### Uploading to your clinical system

If part of your project with Restore, we'll arrange for your digital files to be uploaded to your clinical system.

The upload is performed by specialist Data Migration Teams familiar with the clinical systems. Files appear as a PDF attachment within a Clinical Event of the Care History module.

### Record Destruction

Following delivery to practice of scanned records, whether via a portable device such as a Hard Disk Drive, eView or a clinical systems, Restore Digital will send a formal destruction request to each practice. Destruction covers both the hard copy files which have been scanned, plus deletion of digital files held at the scanning centre.

After destruction and deletion of the records is complete, the practice is issued with a destruction certificate plus supporting documentation detailing exactly what has been destroyed in line with our accreditations covering secure storage, scanning and destruction.



# Get started with your GP note digitalisation journey



## Jill Jesenska

If you're ready to get started, speak to our Primary Care Lead, Jill Jesenska for more information.



[Jill.jesenska@restoredigital.co.uk](mailto:Jill.jesenska@restoredigital.co.uk)



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# About

# Ask Us

Restore Digital is a leading independent provider of document scanning, content input, capture, and business process automation solutions. We're an innovative, digitally orientated division of Restore plc, and our reach is rapidly expanding.

Our mission is to equip our customers with compliant document management solutions and contribute to a world shaped by digital transformation.

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Founded in 2000, our consultancy led approach to the implementation and delivery of integrated digital solutions has enabled thousands of customers to accelerate business processes, reduce costs and improve operational efficiencies.

Here at Restore Digital, we're passionate about what we do, and we take tremendous pride in striving to provide the best possible outcome for our customers.

Visit our website at [www.restore.co.uk/Digital](http://www.restore.co.uk/Digital) for more information about us, the services that we provide, and how we may be able to kickstart your digital transformation.