

Sullivan County Department of Public Health

<u>Title:</u> Archiving Electronic Medical Records	Original Approval: 6/15
<u>Number:</u> AG-08	Reviewed/ revised: 10/17, 3/24
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Statement/ Purpose:

The retention, protection and archiving of medical records is a critical part of corporate compliance and best clinical practice.

Authority:

Application:

All SCDPH Certified Home Health Agency Staff, Information Technology Services Department.

Terminology:

Responsible Party:

Director of Patient Services

Cross-Reference:

Procedure:

Archiving is an automated process and scheduled to run daily, overnight keeping only those electronic medical records (EMR) from the past 3 years in the current database. When the EMRs are archived, they are moved to a separate database called "Homecare Archive." Once archived, the records can be accessed through the Homecare Archive or Composite databases. The EMR can also be restored if necessary. The information that is archived includes all visit data, notes, medications etc. The Production database will keep a record of the patient with their demographics within the customer maintenance section, but there will not be any available episodes to access.

How to archive:

1. While in production, click on Administration>archive/restore/purge.
2. The archive screen will open. Review the "Summary for the Last Run". This should be done weekly to ensure the process is running without problems.
3. Select the Archive tab to view archived records.
4. From the Archive tab you may select a record to restore or export a report
5. The Archive Queue will note all records that meet Archive Criteria.
6. The Archive Exceptions will note all records that were attempted to be archived but could not be. By selecting the hyperlink "QLfailed" a message will note what problem needs to be addressed in the record in order to complete the archive.
7. The Archive Exception will be reviewed on an ongoing basis by SPHN/billing staff. All necessary corrections will be made.

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How to restore archived records:

1. Open the archive/restore/purge
2. Select the option along the top for “Archived”
3. Locate the record and click “Submit for Restore” record will be restored during the next run of the archive.