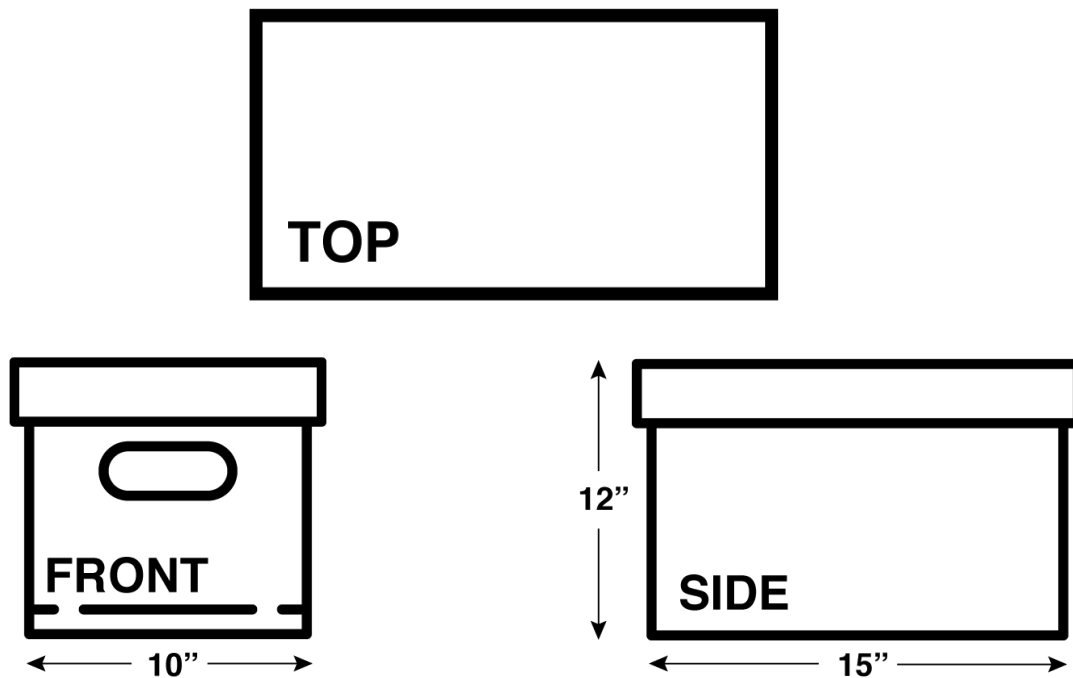




Retiring Physicians: *Banker Box Organization Guide*

We highly recommend following this guide. This ensures a speedy transfer process to patients and new doctors. Not following this guide will increase medical transfer times. We appreciate your assistance.

Banker Box Diagram:



If you require banker boxes, please email onboarding@medrecords.ca

Definitions:

To add clarity, the following terms are defined:

- **Active Patient:** Patients that have seen the doctor within the 2 years.
- **Inactive Patients:** Patients that have **not seen** the doctor within the last 2 years
- **Deceased Patients:** Patients that passed away.

How to Organize Records in Banker Box:

Following this organization is highly recommended:

1. Records must be divided by patient and kept in file folders.
ie. Do **not** discard the file folders.
2. Records are placed in banker boxes in **alphabetical** order
3. All patient volumes should be placed together.

Note: If you're using a different filing method, please email onboarding@medrecords.ca with a detailed description of your organization method. This is imperative for us to respond to your patients effectively.

How to Label Banker Boxes:

The **FRONT** of boxes need to be labeled as follows:

1. Active OR Inactive OR Deceased
2. Last name of the first and the last patient in the box (*Figure 1*)
eg. Anderson - Bishop

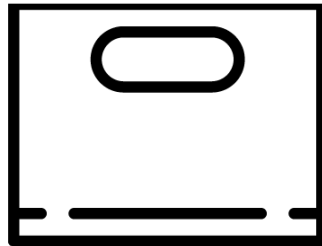
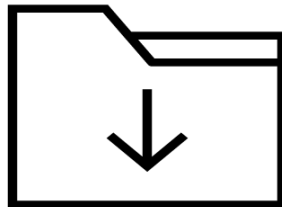


(Figure 1: "Active" and last name of the first and last patient)

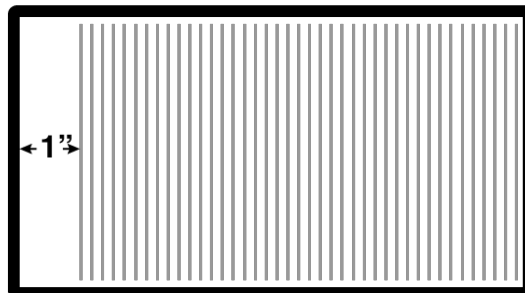
How to Pack Banker Boxes

Surprisingly, we have received many oddly packed boxes! Please follow these guidelines:

1. All boxes must contain proper fitting lids
2. All Records are to be placed vertically. *(Figure 2)*
3. An inch of space is recommended as overweight boxes can be damaged during transportation resulting in lost files. Overweight boxes can be subjected to additional cost. *(Figure 3)*
4. A list of patient names corresponding to each box placed on top of the filed medical records. Likewise, feel free to tape the list on the inside of the lid. This helps us respond to your patients quickly and effectively.



(Figure 2: Medical files are placed vertically into the box)



(Figure 3: Bird's eye view of banker box. Leave 1" of space to avoid damages. Overweight boxes can be subjected to additional costs)

Records That Need to be Destroyed:

All records that need to be destroyed should be grouped together and placed in its own box:

1. These Boxes need to be taped shut
2. Label the FRONT and TOP: "**LEGAL DESTRUCTION**"
3. Please try to keep these boxes separate from the records that need to be scanned during pick-up

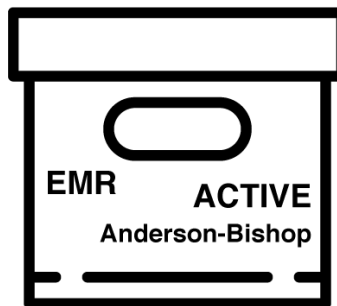
Packing Digital Storage (EMR):

If you have an EMR, you will need to place these on a digital storage device (eg. External hard drive, USB stick etc.)

1. Put the digital storage into a sealed manila envelope
2. Place the envelope into a box with records (*Figure 4*)
3. Label the front and top of box EMR (*Figure 5*)



(*Figure 4: Sealed manila envelope containing your EMR. Placed on top of paper records*)



(*Figure 5: Labeled box with "EMR" to indicate the box containing the EMR*)