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Saratoga Hospital Laboratory  
211 Church Street, Saratoga Springs, NY 12866  
Clerical Support Services

## Warehouse Storage Procedure for Clinical Laboratory Records

### Purpose:

This procedure provides instructions for storage of laboratory records at an offsite facility. Record retrieval instructions are also included.

**Scope:** Saratoga Hospital Laboratory and all ancillary sites.

### Policy:

Each section of the laboratory is required by our regulatory agencies to maintain records for specific time frames. These records include hard copies of laboratory results, requisitions (scripts), transfusion records, quality control records, etc. Long term storage of records is maintained off site. The company that stores the records is called:

Schaap Moving Systems Inc.  
151 Railroad Ave., Albany, NY, 12205.

### Procedure:

#### Preparing Records for Storage:

All files are to be stored in a logical manner that will allow for easy retrieval of the record. Filing records by date, alphabetically, numerically or by accession number is acceptable if they allow the record to be retrieved quickly.

#### Section Responsibilities:

1. All files must be organized according to each section's protocol for storage of records.
2. Label the box with the department, contents, dates within the box, and destroy date.
3. Place labeled boxes in the designated storage area and record information from the labeled box on the "Schaaps Information Sheet" (Attachment #1).
4. Submit the information sheet to the laboratory warehouse coordinator.

#### Warehouse Coordinator Responsibilities:

5. When the number of boxes waiting to be shipped reaches six, email the departments that a pick-up is being scheduled and to submit any additional boxes by the due date.
6. Inspect the records to make sure they are filed as described above. *Any boxes that do not comply with labeling requirements must be rejected and will be returned to the supervisor.*

#### Entering Box information into the Excel Inventory File:

7. Obtain a Schaaps records management barcode number from the barcode folder. This barcode is attached to the box and the number recorded on our excel spreadsheet.
8. Select the "Inventory with Schaaps Numbers" spreadsheet file located on the hospital intranet (Lab/Lab/Warehouse). Enter the following information on the spreadsheet:

OUR BOX #	DESCRIPTION WITH DATES	DESTROY DATE	SCHAAP NUMBER	DATE SENT
CHEM 10-23*	ORIG CENTAUR MANUALS APRIL 2004-DEC2009	1/1/2013	562805	1/31/11

### Schaaps Information Sheet

Instructions: Fill in all required information except Box # and Schaaps #. The box will be rejected if the information is not completed.

<b>Contents:</b>	<b>Contents:</b>
<b>Department:</b>	<b>Department:</b>
<b>Dates included:</b>	<b>Dates included:</b>
<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>	<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>
<b>Contents:</b>	<b>Contents:</b>
<b>Department:</b>	<b>Department:</b>
<b>Dates included:</b>	<b>Dates included:</b>
<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>	<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>
<b>Contents:</b>	<b>Contents:</b>
<b>Department:</b>	<b>Department:</b>
<b>Dates included:</b>	<b>Dates included:</b>
<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>	<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>
<b>Contents:</b>	<b>Contents:</b>
<b>Department:</b>	<b>Department:</b>
<b>Dates included:</b>	<b>Dates included:</b>
<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>	<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>
<b>Contents:</b>	<b>Contents:</b>
<b>Department:</b>	<b>Department:</b>
<b>Dates included:</b>	<b>Dates included:</b>
<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>	<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>
<b>Contents:</b>	<b>Contents:</b>
<b>Department:</b>	<b>Department:</b>
<b>Dates included:</b>	<b>Dates included:</b>
<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>	<b>Box#</b> <span style="float: right;"><b>Schapps#</b></span>

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**\*Numbering system:**

CHEM: Department  
"10": Year box was sent  
"23": The number of boxes sent for that year (i.e. #23 out of 26 boxes" .

**DEPARTMENT ABBREVIATIONS**

Blood Bank	BB
Chemistry	CHEM
Collection Station Records	COLL
Cytology	CYTO
Homedraw Records	HD
Hematology	HEMA
Laboratory Administration	LABAD
Microbiology	MICRO
Outpatient requisitions/scripts/recurring scripts	FRT OFF
Pathology	PATH

9. Save the "Inventory with Schapps Numbers" spreadsheet. Save a second copy and label as "View Schapps Inventory".

Preparing Box Labels and Shipment Instructions:

10. Obtain a page of 2x4 white shipping labels from the label folder.
11. Under Microsoft Word, select the Lab/Lab/Warehouse folder; select the "Print Warehouse Box Labels".
12. Enter the box information from the "Schaaps Information Sheet" and generate labels.
13. Make a copy of the completed label sheet.
14. Label the boxes with our label **and** the Schaaps barcode label. This is critical for ensuring that the box can be easily retrieved. **Failure to comply can result in loss records.**
15. Call Schaaps Record Storage 459-2222 and request a pickup of the boxes.
16. The Schaaps courier will pick up the box and leave a receipt. Attach the receipt to the "Schaaps Information Sheet" and the copy of the label sheet.

**Record Retrieval:**

1. Open the Lab/Lab/Warehouse folder and select the excel document "View Schapps Inventory".
2. Select the appropriate department and obtain the Schaaps box number and all the document information.
3. Submit the information to the office coordinator/designee.
4. The coordinator/designee will call Schaaps to request a record retrieval. Most records will be faxed within 2 hours. If the entire box is needed, it will be delivered on the next scheduled delivery date.

Date of origin: 4/8/03

Date Revised: 2/11/99, 1/2/07, 10/9/08, 02/24/10, 2/10/11

Written by: David Swarczewski

Revised By: Paula Burke/Madeline LaPierre

Date Placed in Service: 2/9/12

Approved by: Jeanne M Leonard  
Clerical Services Coordinator

1/6/12  
Date

WV Freeil # Ms  
Laboratory Director

2-9-12 7:15pm  
Date

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