**EXPRESSION OF INTEREST ENQUIRY:**

 **WHPC00173 – MEDICAL RECORDS STORAGE & RETRIEVAL**

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10. **Introduction**

The Health Records Service at Walsall Healthcare NHS Trust is responsible for providing medical records for inpatient and outpatient activity for the Trust. Our team ensure that there is a patient record created, retrieved, and prepared for all clinical activity. The Health Records Library currently holds approximately 160,000 active patient records onsite with a further 40,000 active and 500,000 inactive records at an offsite storage facility. Our Service is responsible for requesting the daily retrieval and delivery of notes from an offsite storage provider in with the demands of the Organisation.

The Contract with our incumbent supplier is subject to an estimated £757,000.00 termination cost associated with the transfer and removal of all existing records in their storage facilities – We require an indictive proposal as to how this would be facilitated into a new Contract and how this will be managed throughout the life of the Contract.

There is potential for this to become a collaborative project with Royal Wolverhampton NHS Trust, but this is to be decided based on the outcome of EOI – Further details will be confirmed once we reach this decision.

1. **Background**

Requests for records are made as required for clinical activity including inpatient, outpatient, and urgent care. Requests are typically made within 3 days of outpatient activity, though urgent and ad hoc requests (Half-day and Rush orders) can be made at short-notice (often for the same day) due to the nature of the healthcare service.

Records are delivered to the Health Records Library where they are prepared by our team for reference and documentation during clinical activity. Records are transported to outpatient locations and ward areas by internal portering staff, and returned to the Health Records Library once activity is complete. The Health Records team then check the patient of each record for planned activity in the near future, track the record and send to offsite storage or file into the Health Records Library accordingly.

Our objective is to ensure the provision of a patient’s medical record for all clinical activity.

1. **Scope of the Contract**

They offsite storage provider should provide a daily retrieval, delivery and collection service for the Health Records Service within defined and agreed timescales. The offsite storage facility should house inactive medical records.

1. **Detailed Requirements**

Mandatory Requirements

* To supply offsite storage for medical records.
* To supply retrieval services for medical records: twice daily AM/PM Monday – Friday,
* *You will be required to provide a separate quote for the additional cost of retrieval services once daily on Saturdays, Sundays, and Bank Holidays*
* All deliveries and collections to be made to and from the Health Records Library, Walsall Manor Hospital, Moat Road, Walsall WS2 9PS.
* Two delivery locations – for inpatient records requests, Old Health Records Library. For outpatient records requests, New Health Records Library. Both Libraries located at Walsall Manor Hospital.
* One collection location – Old Health Records Library.
* Monthly report to be provided detailing activity and expenditure.
* Online portal to be used to request patient records.
* Tracking history of notes must be viewable via a secure online portal.
* Invoice to be forwarded at the end of each calendar month including breakdown of costs and services for the individual monthly activity.
* Transportation, handling and storage of notes must comply with GDPR requirements.
* Any requested record that cannot be delivered/located, an email is to be sent notifying of last tracking details.

Mandatory Delivery Requirements (SLA to be drafted and agreed)

* Standard Delivery Monday – Friday: one delivery at approx. 08:00 and one delivery approx. 14:30.
* *You will be required to provide a separate quote for the additional cost of delivery services on Saturday, Sunday, and Bank Holidays: one delivery at approx. 13:00.*
* Half-day delivery requests made before 08:00 must be delivered same day by 15:00.
* Half-day delivery requests made between 08:00 and 15:00 must be delivered the following morning.
* Delivery for Rush orders must be made within 3 hours of request.
* Delivery requests average between 4,600 – 5,000 per month.
* Rush Delivery requests are kept to a minimum where possible, but average between 3 and 10 records per month.

Mandatory Collection Requirements (SLA to be drafted and agreed)

* Collections to be made twice daily Monday – Friday, and once daily on Saturdays, Sundays, and Bank Holidays.
* *You will be required to provide a separate quote for the additional cost of collection services once daily on Saturdays, Sundays, and Bank Holidays.*
* Confirmation must be sent by offsite storage supplier upon receipt of a request for notes.
* Each delivery box must have a manifest of content detailing the patient name, unit number and requester information for each record.

Indexing

* Capture the patient demographics, to include patient name, date of birth, hospital number, sex, date of death.
* To capture date of receipt to enable tracking of patient record

Ordering of Patient record

* Authorised Users must place orders using an online portal. Where this is not practicable, Authorised Users may order by telephone or via email.
* - Authorised Users shall be responsible for providing off site storage provider with sufficient information to perform the Services.
* At the Customer’s instruction off site storage will provide services as below:-

Storage

* Offsite storage will maintain space for approximately 540,000 Articles within a suitable environment.

Destruction

* Authorised Users must request to have a specific Article destroyed. Upon receipt of request the Article will be retrieved from the storage location at the IM Facility and destroyed in a secure and safe manner and in accordance with EN15713. Should the Customer require a significant volume of Articles to be destroyed the parties shall agree timescales for the destruction.
* A certificate of destruction must be supplied to the Customer within 30 days of the date of destruction.
1. **Service Levels and Key Performance Indicators (KPIs)**

Health Records Services take a daily record of the number of boxes/packages received, including the times of these deliveries. Health Records Services will perform a bi-monthly audit to ensure delivery times are met and requested notes are delivered, or notification has been received if records could not be located.

All requirements must be met due to the nature of the service and risk to patient safety.

Data will be retained in line with NHS Records Management principles; up to 25 years and returned or destroyed upon explicit instructions from Walsall Healthcare NHS Trust (the Controller).

1. **Contract Management and Review**
* Monthly report must be provided by offsite storage supplier detailing any changes in activity, costs, or expenditure.
* Quarterly report must be provided by offsite storage supplier detailing activity and expenditure trends.
* Quarterly meetings must be held to review activity and service.
1. **Sustainability**

*A minimum10% requirement must be included in tender bids.*

1. **General Data Protection Regulation (GDPR) and Privacy Impact Assessments (PIA)**

*The successful applicant will be expected to complete the below documents, following a Mini-Competition procedure against a Framework.*

*DPIA*

*SAF*

*Data sharing agreement*

1. **Contract Period**

Following a Mini-Competition Procedure against a Framework the expected Contract start date is 1 April 2025 and expiring 31 March 2028 with two 12 month extension options.