

What's The Issue?

There is no consistent collection or review of physical documents for destruction eligibility and/or archival filing.

Fishbone results showed filing/destruction is not a priority task and the need goes unnoticed. This results in large amounts of unfiled documents acclimating over time.

Securing physical records requires physical space and having them digitized makes for easier retrieval.

Large quantities of physical records may contribute to breeches in confidentiality and privacy.

Why It's Important

- To maintain legally required timeframes and be in compliance with documentation regulations
- Improved documentation organization assists with reduced search time requirements and allows WCHD staff to better serve the public and quickly respond to FOIAs, audits, etc.
- Consolidations for bigger submission to the Local Records Commission allows for easier tracking of destruction approvals.

What We Did

A Fishbone Analysis was used to determine contributing factors that lead to records not being archived or destroyed in accordance with legal guidance. This year the QI Team determined that a reminder system would be a variable we could influence. This led to the following:

- Implemented quarterly email reminders to prompt WCHD staff on the need for routine records review;
- Point of contact within each Center for questions WCHD staff may have had during the review process;
- Previous processes established during 2024 QI Project Timeline were reinforced, standardized, and adopted for current year.

Lessons Learned

- Reminders were helpful in influencing regular submission of records for filing and/or disposal.
- Education alone was not enough to ensure regular review or collection of documents. Center level support and prompting of required tasks needs to continue for appropriate records retention and destruction procedures to occur consistently.
- Majority records are being digitized for storage versus physically stored versus previous years. Makes storage options more flexible and requires less physical space.

Results

- Established routine quarterly email reminders to prompt WCHD staff on the need for consistent records review, resulting in increase in WCHD staff responsiveness and inquiries regarding documentation reviews.
- Participating Centers achieved the stated QI Goal of reviewing 20% of records.
- QI Team executed the needed steps for records retention and destruction at higher levels than previous year(s) through increased rates of destruction submissions to the Local Records Commission.

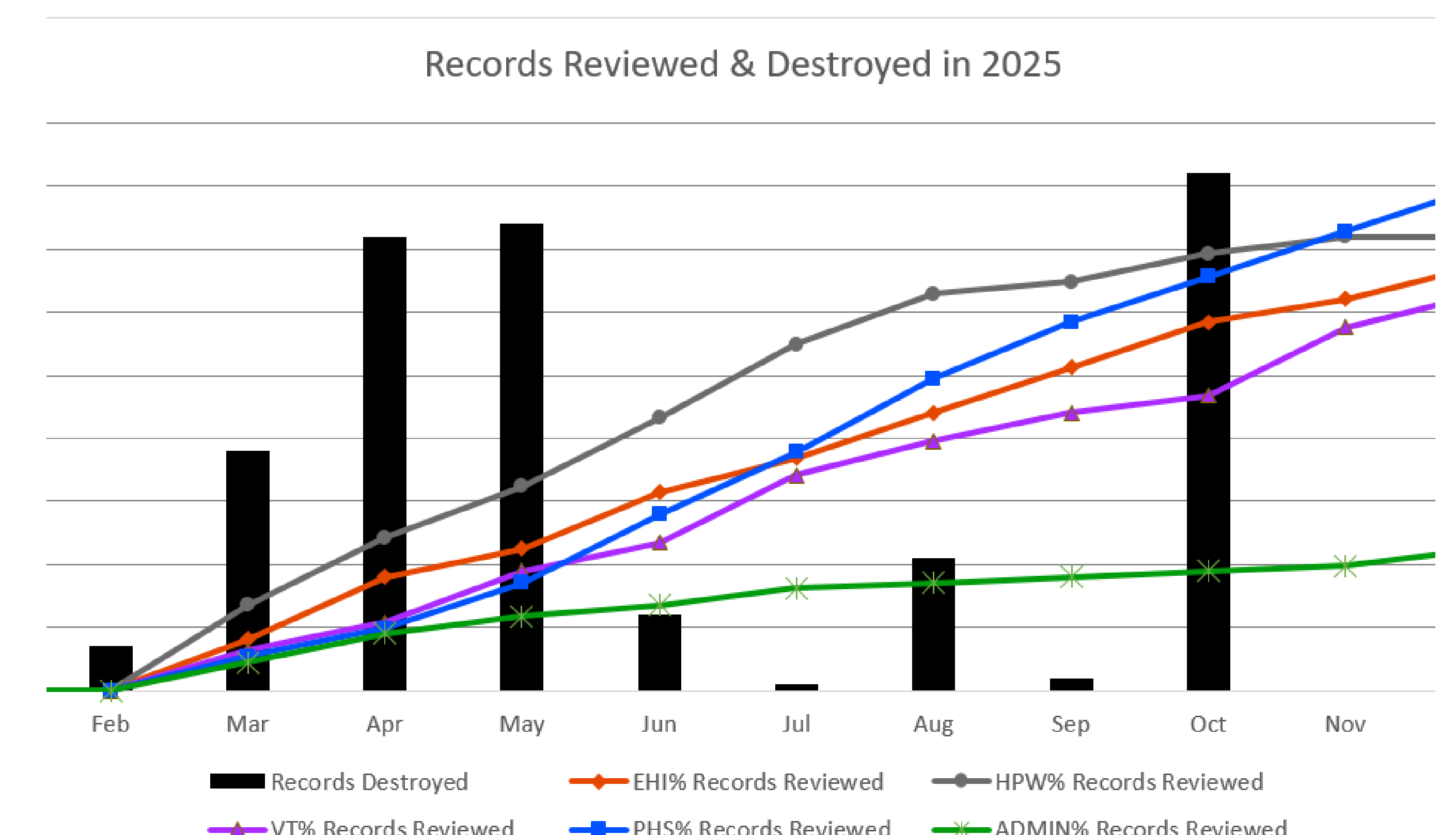
Next Steps

This QI Project is in the Act/Adopt Phase and our next steps include:

- Project will continue through institutionalized processes becoming more routine. QI Project will carry on with slight modification into a focus on digital destruction for 2026.

Team Members

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WCHD Records Reviewed & Destroyed in 2025