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DOCUMENT SCANNING FOR HUMAN SERVICES PROFESSIONALS

THE BENEFITS OF SCANNING YOUR DOCUMENTS FOR YOUR PRIVATE PRACTICE

PRESENTED BY: DAVID GUERRA
DAVEGUERRA.COM
PO BOX 3693 • EDINBURG, TX 78540

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We are well into the 21st Century and we are still dealing with so much paper that the dream promised to us by the Jetsons, Lost in Space, Star Trek and every other motion picture and television show about the future and living in a paperless society has not happened. Knowing fully well that a paperless society is right in our grasp, yet we refuse to give in and make it a reality. Every day, people all over the country and the world generate page after page of unnecessary paper. However, armed with a simple document scanner, an external hard disk drive and your laptop or PC you are well on your way to that long awaited modern paperless practice.

For the price of what a PC cost a couple of years ago, now you can purchase all the equipment and have it set up in no time. Almost immediately, you are scanning your notes, digitizing state and federal forms the client has completed by hand and electronically securing those records.

YOUR SECURITY WORRIES ARE ALL BUT GONE

OK, maybe not all your security worries will be gone but most will. In most cases, immediately after scanning the documents you are given an opportunity to secure the scanned docs with a password. This is easily done if you happen to have the full version of Adobe PDF software installed on your PC or laptop. The online version of Adobe PDF will work but it will not be as fast as doing it locally (on your PC).

You can opt not to have the individual files encrypted but secure the folder the documents are located. Using applications such as Secure IT and Folder Locker the entire contents of the folder are protected against access by anyone who does not know the password. However, if you have trouble keeping track of numerous passwords or securing individual folders is a bit too much for you there is relief.

That relief comes in the form of what I consider the easiest thing you can do; securing or encrypting your entire hard drive. Using an application known as BitLocker (comes standard in Pro, Enterprise, and Education editions of Windows 10). The entire disk is protected and has no built-in backdoor which ensures your files are protected from any type of intrusion or forced attack. A word of warning, because it has no built-in backdoor, if you lose or forget your password there is nothing you can do to access your information.

Lastly, is one that most people do not think about as an added layer of file or data protection. Having to enter a password just to log in to your account on the PC or Laptop you use. Sometimes, this alone is deterrent enough to keep the wolves at bay.

MULTIPLE INDIVIDUALS CAN USE THE SAME DOCUMENT AT THE SAME TIME

As a human services professional there will come a time that you will need to conduct a monitored interview. This may mean that you are in an observation room with a client and an observer is behind a two-way mirror or some dark tinted glass window. Think something like the interrogation rooms you see in the television show "Law and Order".

You are interviewing your client and the observer is observing. However, when you pull up client data on your laptop or tablet, the observer can do the same thing. That's right, the two of you are not peering over each other's shoulders to see the patient file but are sitting comfortably in your respective chairs and reliably accessing the data you need when you need it.

AUTOMATE COLLABORATION, CONSULTATIONS, AND SUBPOENA FULFILLMENT?

As mentioned, using scanned documents when the need is immediate and proximity is not an issue. However, those same scanned documents can also be used when it calls for the information to be shared over a great distance or other situations say in a court proceeding. This is great considering that when you share the document you share exactly what is requested.

In the case of litigation, civil or criminal, again only the requested information is presented to the counsel, district attorney or to the judge for an “in camera” inspection then ultimately, entered into evidence.

Something to remember when printing hard copies of your secured PDF files, you have the option of including the BATES number stamping on every page. This numbers your pages from number 1 to whatever the last page is. Bates stamping that all sides of a court hearing and quacking reference a page as opposed asking the attorneys and judge to look at the page that starts with the word “pecan pie” for example.

Otherwise, it would behoove you to get a BATES stamp machine and do it yourself before presenting them to the court or attorneys during the Discovery phase.

ACCESS EVERYTHING FROM ONE LOCATION

In a private practice setting, you can confidently store your files on your PC’s hard drive. By confidently, I mean you can store them so long as you are encrypting the files (at least) and you are creating routine data backups. In a practice that has more than one individual you can store your data to a NAD (Network Attached Device) or commonly known as NAS (Network Attached Storage) device. It can be described as a device “ideal for giving multiple users remote access to large amounts of data.” This device can sit on its own with a power cord and a network cable attached to a network switch or router. These NAS devices will typically cost a couple of hundred dollars for about 4TeraBytes of storage space.

If you are not too sure what a TeraByte of storage space is, a typical DVD can hold up to 4.7GigaBytes of data. Doing that math, that comes to approximately 212 DVDs worth of data to equal just under 1 TeraByte of data space. Then multiply that by four and that is about 848 DVDs of data space on the Network Attached Storage device.

Of course, there are individuals that swear by just putting everything on the cloud, you will not have to worry about data backups, and you have all the data storage space you will ever need. Yes, the cloud offers all that plus peace of mind. Then if you happen to live in the part of the world that is susceptible to severe weather events, the cloud could be a blessing and a curse. A blessing in that all your data is protected from the elements. It is a curse because when the power goes out or the lines are down your connection to the Internet and access to the cloud suffers. This is not a good thing when it comes to an emergency dealing with a client that is having issues because of the severe weather.

It is most definitely a toss-up when it comes to using a locally attached device or the cloud. Personally, I would opt for a combination of both; use a locally attached device and back up to the cloud. No matter if a situation exist or not, and you are still undecided how to proceed there is nothing wrong with attaching a portable, external Hard Disk Drive to your laptop and one password later you are accessing your information.

AVOID ACCIDENTS THAT RISK YOUR DATA

When it comes to having stacks and stacks of paper laying around or in an ever growing filing cabinet there are some inherent concerns especially the longer you go without a document scanning solution. Sure, the simplest and most obvious concern is losing a document here or there. It happens to everyone, even those who scan as they go along. Then other concerns inevitably creep in. Things like spilling coffee, or for those that still smoke spilling the ashtray all over your desktop. Then those after hours concerns such as fire, water, and other natural disasters. Not to mention the man-made disasters that have been recently quite prevalent in the news.

Then there is one concern that no case worker or social worker ever wants to imagine could ever happen to him or her. I have personally seen a client walk out of the office with a file folder vowing never to return. The file folder contained every piece of information the practitioner had on that individual. No amount of talking, negotiating or threats (of calling the police) were going to change the individual's mind. While you cannot physically touch the client, the best thing to do is to let the patient go and self-report the individual himself took his own records. However, having the records in digital format while it might not have solved the client's problem, the records would still be secured and the patient would have walked out only with the computer monitor under his arm. Replacing a monitor is infinitely easier than replacing a set of lost records.

When it comes to securing your paper records either by scanning them or adding an extra padlock on your filing cabinet, you have to do something (preferably not the latter). Develop a strategy to have all your paper documents scanned and protected. Remember that for some getting started will be the most difficult thing to do. Having never scanned their documents, the task of getting caught up will be so daunting that you will be tempted to give up. The benefit and reward document scanning will always outweigh the risks and the downside of not scanning your paper documents. Stay the course and protect your content. Protect your practice, and most of all, protect the privacy of not just yourself but of your clients.

I HOPE I HAVE HELPED YOU

Let me know by email: dave@daveguerra.com or Twitter: [@daveguerra](https://twitter.com/daveguerra)

Thank you

David Guerra, MBA

IT Professional with +25 years Real World Experience