



MASSACHUSETTS VETERINARY MEDICAL ASSOCIATION'S STEP-BY-STEP GUIDE TO VETERINARY PRACTICE EMERGENCY & DISASTER CONTINGENCY PLANNING

PRESERVATION OF RECORDS

By now, you should have completed **Step 1 – Create Your Employee Contacts List** and **Step 2 – Create Your Key Contacts List**. (If not, get to it!) It's time now to [temporarily] get out of the list-making business and work on creating backup systems for your records. What kinds of records? Everything you need to reestablish your business: client contact information, animals' medical records, regulatory requirements, etc.

Here's a warning: this is not going to be an easy task, and it's not going to be quick. It will, however, be worthwhile, and we hope that the chart on the reverse will make it easier. You also don't need to do it all at once, so don't get discouraged!

You'll need to identify all the different types of records that you need to preserve, as well as all the steps of how you will preserve them. As you create these systems, you will probably be prompted to add vendors, service providers, and other contacts to the list you compiled in Step 2. That's fine: emergency planning is an ongoing process that should be updated and revisited regularly.

When we speak of creating backup systems, we mean **duplication of records to an offsite location**. And as veterinary practice and business become increasingly computerized, veterinarians may be expected to have information readily available that would have been unthinkable a couple of decades ago. It's time to take a critical look at your practice and ensure that your activities of today position you to handle adversity in the future.

For this particular task, it is useful to have at least one other person involved in the process: it's common that we overlook the things we've become accustomed to, especially things like internal business systems. A fresh set of eyes can identify, or at least raise inquiries about, our processes so that we are forced to take a second look.

You should adopt a policy for each type of record as to:

- whether it will be duplicated, in whole or in part
- when it will be duplicated, and how frequently it needs to be updated, if applicable
- how it will be duplicated and in what form it will be kept (e.g., electronic, paper)
- where it will be kept (e.g., off-site safe, portable hard drive, online storage system, etc.)
- who is responsible for duplicating and preserving these records

Some practices have accomplished limited computerization of medical records, so that the vaccination and prescription information is preserved electronically, but the veterinarians' notes are not. If I were in the position of having to reconstruct a practice, or defend a case at the Board of Registration, I would want more than just the bare minimum, so I encourage you to work toward more complete duplication of records. In the interest of having your clients well-served and their pets receiving appropriate care, you might suggest, or offer, that they take a copy of the medical record periodically and keep it with their important records.

Continued on the reverse



EMERGENCY & DISASTER PLANNING: PRESERVATION OF RECORDS

(MVMA Form 3) Here is a partial list of the kinds of records that you should make decisions about.

	Type of Record	Is there a backup?	In what form?	By whom?	When/how often?	Where kept?
<input type="checkbox"/>	Animals' medical records					
<input type="checkbox"/>	Professional licenses & certifications					
<input type="checkbox"/>	Drug control licenses, logs, etc.					
<input type="checkbox"/>	Hazardous waste permits, logs, etc.					
<input type="checkbox"/>	Radiation permits, logs, etc.					
<input type="checkbox"/>	Inspection records					
<input type="checkbox"/>	Banking & business records (e.g., accounts payable & receivable)					
<input type="checkbox"/>	Tax returns & supporting docs.					
<input type="checkbox"/>	Insurance policies & contacts					
<input type="checkbox"/>	Employee records, contracts, & contact information					
<input type="checkbox"/>	Building-related records: deeds, leases, service contracts, construction records, & occupancy certificates					