ONBASE

PHYSICAL RECORDS MANAGEMENT
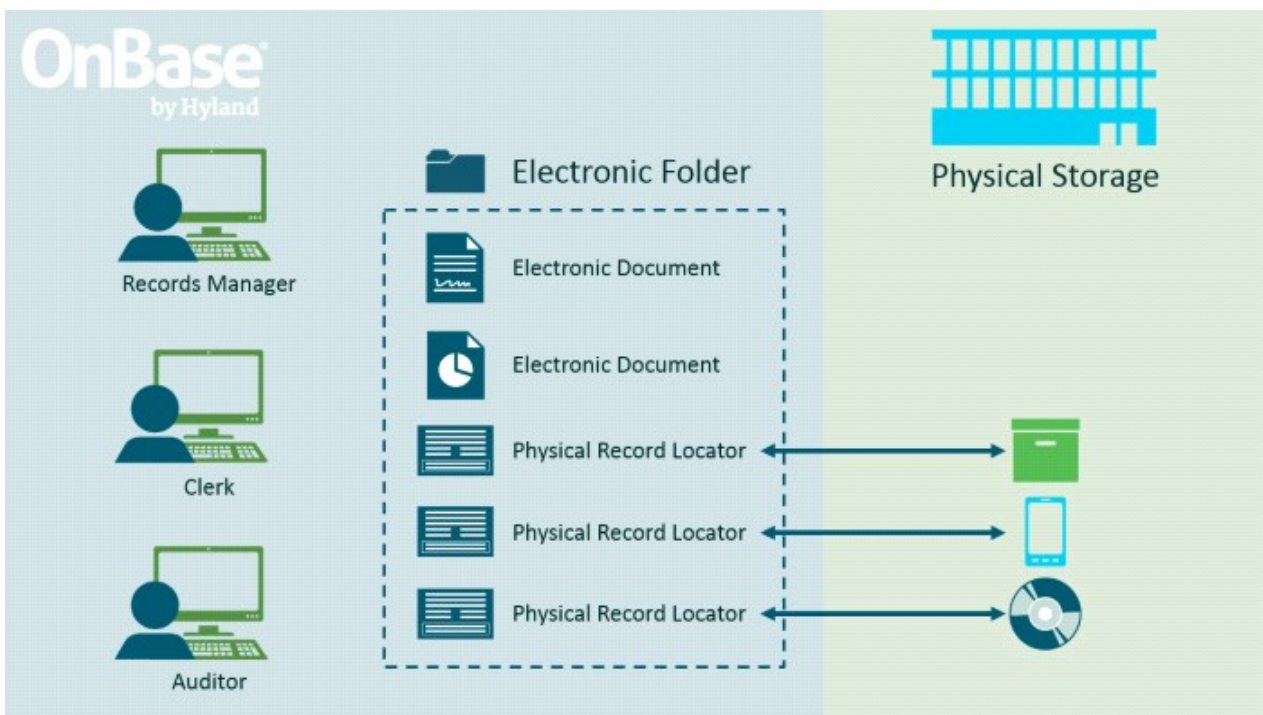
SUMMARY

Physical Records Management (PRM) enables organizations to track, locate and access physical records electronically within OnBase. Physical records are managed alongside electronic documents and records, using OnBase as the single interface, regardless of record location or format.

BENEFITS

- **Provide centralized management** of physical records alongside electronic records in a single system
- **Enforce uniform records policies** across both physical storage facilities and electronic repositories
- **Extend compliance initiatives** into physical record business practices
- **Rapidly discover and locate physical record information** as it relates to electronic content
- **Track the chain of custody** thru an auditable access history and accountability for physical records

DESIGN

From a single OnBase interface (Document Retrieval, Custom Queries or Folders, etc.), electronic documents and related physical record locators are presented and accessed in one cohesive view.

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APPLICATIONS

- **Housing Authorities:** Mortgage loan documents must be retained in their physical form (in addition to electronic copies) for the life of the loan plus seven years. Electronic copies can be cross-referenced to the physical record locator when access to the physical copies is needed.
- **Police Departments:** Physical evidence that cannot be converted to electronic content is automatically correlated to electronic files. As part of an investigation, the existence and location of physical evidence, such as a weapon, hair sample or photograph, is quickly made available relative to electronic content.
- **Healthcare Organizations:** Hospitals that require access to physical patient charts, tests and samples can access the storage location via a cross-reference from the electronic medical record.

KEY FEATURES

- **Configurable record locator** provides up to five layers of classification, scalable to large complex facilities.
- **Granular security permissions** to access, request, manage and create physical records.
- **Physical Record Import Processor** quickly creates and indexes physical record locators into OnBase for large, legacy volumes.
- **Administrative View** displays all current checkouts, pending requests and copy requests.
- **Bar code logic** can be used to check-in or checkout physical records.

INTERFACE

Physical Record Locator (with Cross-References) in the Unity Client

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Physical Record Locator in the Web Client