

Harris County Public Health  
Ryan White Grant Administration  
Policy and Procedures for Scanning Documents During a Site  
Visit

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**REVISED DATE: 06/16**

**POLICY:**

During the site visit, the Ryan White Grant Administration (RWGA) Quality Analysts team will scan and forward all documents that need further review and approval to the Project Coordinator (GM). Scanning of documents is to assist agencies further improve the quality of the client services and ensure compliance with applicable guidelines.

**PROCEDURES:**

1. The Quality Analyst (QA) team will obtain permission from the agency to scan documents needing additional review during site visits in order to ensure compliance with applicable standards of care, site visit guidelines, and other related policies and procedures.
2. The QA team will make every effort to scan blank forms and/or documents containing minimal or no client identifying information. However, if the document contains any client identifying information, this information will be redacted prior to scanning.
3. QA staff will consult with the Project Coordinator (GM) regarding documents an agency has reservations about being scanned.
4. All scanned documents will be stored in a secured network drive and kept for a period of no less than two years from date scanned. All scanned documents will be deleted from the shared drive and, if any, hard copies shall be shredded upon expiration.

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**Approved by Manager**  
**HCPH – Ryan White Grant Administration**

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**Date**