

Healthcare provider reduces costs and risks of records storage with Smart Sort

When it comes to records management, many healthcare organizations unintentionally retain records for much longer than legally required. These records take up valuable space that could be used for patient care, increase costs, and create security vulnerabilities and compliance risks. Over time, it becomes increasingly difficult (if not impossible) to apply proper retention policies and take defensible action.

Many factors contribute to over-retention, but the three key ones are visibility, complexity, and limited resources.

Poor visibility and integrity of files

Many organizations simply lack the visibility needed to identify records and make informed decisions on disposition. This often happens when records are inherited from a previous management team or as part of a business transaction (i.e., a merger or acquisition). In many cases, records are disorganized and/or the appropriate metadata needed to make defensible decisions was never captured.

Complex rules and regulations

Even under the best of circumstances, healthcare records management is a challenging undertaking that involves navigating a complex mix of federal, state, and local regulatory requirements. The challenge is further complicated by commingled records, complex event-based rules, and internal guidelines. One prime challenge involves rules based on patient data, such as patient age and the date of the last visit.

Limited resources

Today, healthcare organizations manage a growing volume of information and records, but they often lack the resources needed to manage all of this information. It then becomes easy to fall behind in establishing and maintaining proper information management and makes it difficult for organizations to catch up.



Why choose Smart Sort

Smart Sort is a great choice for any process where there is a need to quickly and accurately sort and organize a large number of records such as:

- > Acquisitions
- > Divestitures
- > Mergers
- > Legal actions
- > Regulatory filings
- > Digital transformation initiatives
- > Relocation/reconfiguration of existing facilities
- > Reducing records storage

Using Smart Sort to reduce the cost/risk of records storage

Before

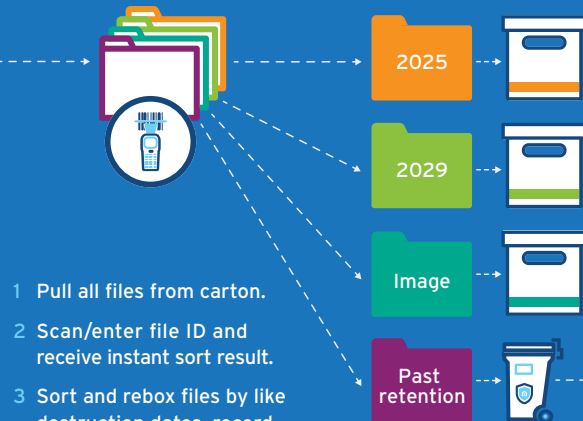


Commingled files and event-date complexity prevent you from making defensible decisions about your records inventory.

The Smart Sort process will sort and reorganize files according to your requirements.

Smart Sort process

Decide which files to retain, destroy, or digitize



- 1 Pull all files from carton.
- 2 Scan/enter file ID and receive instant sort result.
- 3 Sort and rebox files by like destruction dates, record type, a unique identifier—or whatever you require.

After



Files are organized and ready to image on your schedule.

Files are defensibly destroyed by destruction dates.

At the conclusion of your Smart Sort project, you'll have full visibility into your up-to-date file-level inventory so that you can find what you need quickly and enable an ongoing defensible disposition process.

Reorganization and ongoing processes required

The only solution to over-retention is to establish an ongoing process for destroying records as they meet their compliance requirements. But when records are not properly organized—that is, when records of different types and destruction eligibility dates are commingled in the same cartons—they need to be sorted and reorganized. This is a time-consuming and costly process and a situation in which a large private healthcare provider found itself. Fortunately, Iron Mountain Smart Sort had the perfect solution.

How Smart Sort works

With Smart Sort, organizations can locate, sort, organize, and manage a large number of records. Smart Sort is a workflow solution that uses basic information (e.g., patient record numbers) from an organization's core applications and matches that information with a scan or keyed entry of the file ID. This creates an up-to-date file-level listing that maps the location of all files to the individual box level, which means decisions can automatically be made about how to manage each file to meet the specific requirements of the organization.

How a private healthcare provider took advantage of Smart Sort

Situation

Lacking a defensible process for destroying medical records, a large private healthcare organization accumulated more than 48,000 cartons of records, causing its storage costs to escalate and increasing its risk of data loss and noncompliance with privacy regulations.

Challenge

Medical records contain private and sensitive information that is governed by strict regulatory compliance. This provider quickly determined that it lacked the expertise, internal resources, and proven methods to effectively sort through the 48,000 cartons of records and reorganize them in a way that would support compliant and defensible decisions—now and in the future.

Smart Sort in action

A team of Iron Mountain records management professionals went to work. Using Smart Sort, along with relevant information quickly pulled from the provider's master patient index, they were quickly able to:

- Review the records databases of the provider to identify all files under management and assess destruction eligibility
- Scan record IDs from individual paper files contained in the more than 48,000 cartons
- Create an up-to-date file-level listing, mapping the location of all records down to the individual box level
- Sort and rebox all files according to the retention schedule
- Initiate immediate destruction of eligible records to reduce storage costs and mitigate legal discovery, audit, and compliance risks

Benefits of using Smart Sort

Immediate Benefits

- Confidently destroyed 630,000 eligible files
- Reduced the amount spent on records storage by 40 to 50%
- Made space available to be repurposed for new patient care initiatives

Long-Term Benefits

With an up-to-date file-level listing, the provider streamlined its records management, further reducing costs and making retention easier and more compliant.

With Smart Sort, the provider was able to:

- Speed up the process of locating records
- Increase record find rates
- Make defensible decisions about which records could be destroyed and which need to be retained
- Eliminate the problem of commingled records, enabling future box-level destruction decisions
- Reduce the space devoted to records storage, lowering costs and facilitating office reconfiguration
- More easily meet legal and regulatory retention and compliance requirements

Learn more about Smart Sort

Any business process that involves sorting and organizing records can benefit from Smart Sort.

To learn more or to request information, contact your Iron Mountain account manager directly. Go to our Smart Sort [web page](#), or fill out this [form](#) and include the words "Smart Sort" in the comments section.

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About Iron Mountain

Iron Mountain Incorporated (NYSE: IRM), founded in 1951, is the global leader for storage and information management services. Trusted by more than 220,000 organizations around the world, and with a real estate network of more than 85 million square feet across more than 1,400 facilities in over 50 countries, Iron Mountain stores and protects billions of information assets, including critical business information, highly sensitive data, and cultural and historical artifacts. Providing solutions that include secure storage, information management, digital transformation, secure destruction, as well as data centers, art storage and logistics, and cloud services, Iron Mountain helps organizations to lower cost and risk, comply with regulations, recover from disaster, and enable a more digital way of working. Visit www.ironmountain.com for more information.

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