

Hospital reduces records storage costs and improves visibility and compliance with Iron Mountain **Smart Sort**

Medical records are essential to efficient patient care delivery, and they are also highly regulated. Any decisions about how they are managed—that is, what should be retained and for how long, as well as what should be destroyed—must comply with the laws and regulations that protect the integrity and security of health information.

When a large U.S. medical center decided to take control of its records management program, it realized the need for better file-level visibility, along with a more efficient and defensible process for making decisions on disposition. Seeking a process to support its short-term need to move records offsite as well as a simplified records management system for the long-term, the medical center turned to Iron Mountain Smart Sort.

How Smart Sort works

With Smart Sort, organizations can locate, sort, reorganize, and manage a large number of records with greater clarity. Smart Sort is a workflow solution that uses minimal 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. The Smart Sort technology was designed to automate decision-making and data mapping once a match is identified. As a result, full file-level visibility is created for each individual box, and organizations are enabled to quickly make decisions on the disposition of each file.

Let's take a closer look at how this major medical center took advantage of Smart Sort.

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 for visibility and compliance in medical records storage

Before



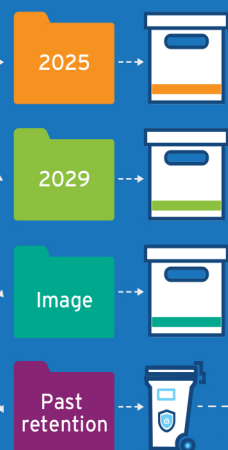
Commingled files and event-date complexity prevent you from making defensible decisions about your records inventory.

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.

Medical center improves records management process with Smart Sort

Situation

To make room for new patient care initiatives, a medical center set out to free up space by relocating their paper records to an offsite facility. Before placing their files into storage, they wanted to identify all records that were eligible for destruction so they could reduce risk as well as storage costs.

Challenge

Any action a healthcare organization takes with regard to patient records must be defensible. It must strictly comply with state and federal laws as well as healthcare privacy regulations and contractual arrangements (e.g., with insurance companies). The medical center quickly determined that it lacked the necessary visibility and an established process to make defensible decisions about which records to retain and which ones were eligible for destruction.

Smart Sort in action

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

- Review the records database and retention schedule to identify all files under management and assess destruction eligibility
- Scan record IDs from individual file folders
- Organize and review files by disposition year and create an up-to-date list, mapping the location of all records down to the individual box level
- Sort and box all files according to the retention schedule
- Initiate immediate destruction of eligible records to reduce storage costs and mitigate potential discovery, audit, and compliance risks

Benefits of using Smart Sort

Immediate benefits

- › Gained visibility across its records inventory and established a process for defensible disposition
- › Reduced the amount spent on records storage by \$1 million over five years
- › Relocated records offsite to free up space for new patient care initiatives
- › Simplified their records management program

Long-term benefits

With an up-to-date file-level listing, the medical center can now easily search, manage, and make decisions on retention and digitization, as well as ongoing defensible destruction.

The medical center staff use Smart Sort to:

- › Speed up the process of locating records
- › Increase record find rates
- › Make defensible decisions about which records can be destroyed and which need to be retained
- › Enable future box-level destruction decisions
- › Reduce the space devoted to records storage, lowering costs and freeing up additional space to expand patient care
- › 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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