

Case study

UTMB Health starts with Smart Sort to advance digital transformation

Discover how this healthcare organisation quickly and defensibly reduced and relocated physical inventory with Iron Mountain Smart Sort.

Tackling legacy records cleanup to reduce cost and prepare for the future

The **University of Texas Medical Branch (UTMB) Health** is a leading academic health sciences centre for research, education, and patient care located on four campuses across southeastern Texas. The organisation's Galveston, TX, campus faced a significant challenge in 2022 when the lease on one of its storage facilities—known as the Lipton Tea building—was about to expire. The 72-year-old former warehouse contained patient records, emergently relocated physical records from 2008 Hurricane Ike, and microfiche and microfilm dating back to the days of UTMB Health's permanent record policy.

The inventory was four floors of commingled, historical, and fragile physical records: In other words, the stuff of a records manager's nightmares.

In March 2022, the UTMB Health real estate team worked closely with Iron Mountain to develop initial plans for

moving out of the building. As UTMB Health was already storing more than 400,000 records with Iron Mountain in secure offsite storage facilities in Houston, TX, it was clear that Iron Mountain Smart Sort was the perfect solution to help identify, sort, and increase file-level visibility for the Lipton Tea—and other campus—records.

"The Iron Mountain team really understood the depth and the breadth of this project. It was a tremendous undertaking," explains Carla Cuney, Director of Health Information Management & Medical Staff Services at UTMB Health.

By August 2022, this large-scale Smart Sort project was underway. UTMB Health teams were on the ground identifying records for destruction versus relocation. Records that could be defensibly destroyed were removed, and the rest safely transported to an Iron Mountain storage facility in Dallas, TX.



Industry

Healthcare

Challenge

Faced with the closure of a historic facility and the need to identify, sort, and move thousands of patient records, microfiche, and microfilm, UTMB Health needed to defensibly reduce and relocate its inventory in a matter of months.

Solution

Iron Mountain Smart Sort

Results

- Sorted paper medical records and microfiche by type to determine destruction eligibility and ongoing defensible disposition
- Vacated expired building within four months and reduced record storage spend by >40%
- Opened the door to further digitisation efforts



Additional records from other campuses were also included in the project. In Dallas, the Iron Mountain Smart Sort team got to work on commingled files that were then identified and further sorted by future destruction eligibility, retention, and digitisation priorities.

“We had a call with the team every single week. Our dashboard showed us the progress that they were making every day. It was very organised,” says Cuney.

The Smart Sort project was completed in Q3 2024 and has resulted in a **40% reduction in UTMB Health's storage costs**, as records are now being destroyed rather than stored indefinitely. With up-to-date file-level listings, the records team at UTMB Health can now easily search, manage, and make decisions on future digitisation and ongoing defensible destruction.

“Smart Sort has helped us with records management. We can handle retention on a continuous basis, and we can focus on other things that we need to take care of as HIM directors and records managers.”

Carla Cuney, Director of Health Information Management & Medical Staff Services, UTMB Health

A risk management strategy everyone can stand by

Smart Sort was instrumental in changing the perspective of the Health Information Management (HIM) team at UTMB Health. Outdated retention policies, the organisation's move to a new electronic health records software in the early 2010s, and the importance of digitisation and resilience as regional climate events increase in severity were key factors driving UTMB Health to find a partner to help bring its records management into the future.

The Iron Mountain team presented data in a well-organised and easily accessible format and removed the burden of manually handling records management. Key stakeholders—from compliance, risk, and legal to database managers and the IT team—saw the benefits of Smart Sort from the project's beginning.

“Anytime you do any type of defensible disposition, especially medical records, you're going to improve compliance and tie it back to policy and governance. That was critical for UTMB decision makers,” says Arnie Padilla, Iron Mountain Managing Director.

“The cost savings over time is very black and white.”

Carla Cuney, Director of Health Information Management & Medical Staff Services, UTMB Health

Using Smart Sort, the team was able to:

- Review the records databases to identify all files under management and assess destruction eligibility
- Scan record IDs from individual paper files and microfiche
- Create an up-to-date file-level listing, mapping the location of all records down to the individual box level at the new Dallas, TX, storage facility
- Sort and rebox all files according to ongoing retention schedules
- Initiate immediate destruction of eligible records to reduce storage costs

Opening the door for future digital transformation

UTMB Health's experience with Smart Sort has created a strong foundation for its future digital initiatives. By managing and streamlining records, the organisation has opened up the opportunity for more strategic planning and forecasting.

Today, the UTMB Health team continues to partner with Iron Mountain to:

- Speed up the process of locating records and increase record find rates
- Make defensible decisions about which records to destroy and which to retain while enabling future box-level destruction decisions
- More easily meet legal and regulatory retention and compliance requirements
- Jumpstart an opportunity to transition to a Managed Service Program and enable forecasting
- Ready its records program for future digitisation efforts, optimised data insights, and advanced automation and AI initiatives

Smart Sort for Healthcare

No matter what you're storing, we'll make it easy to clean up legacy records so you can continue providing excellent patient care in a digital world. Visit [Smart Sort](#) for more information.



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