



SmartOrg™ Greatly Accelerates Time-to-Analysis for Malpractice Insurance Company

CASE STUDY

Challenge: Inconsistent Records Indexing

A medical liability insurance company had nearly 50 outside counsel law firms spread across 10 states, and every firm and paralegal used their own process for records indexing and organization. Receiving records from every firm, the insurance adjusters struggled to stay aligned with paralegal paperwork and adapt to each local indexing approach. The company approached Ontellus asking for a customized solution that would organize records across all firms for increased visibility and case collaboration. The Ontellus solution development team performed a detailed needs assessment and immediately went to work creating a unified records system that would offer access and storage flexibility.

Solution: SmartOrg™ Introduces Standardization

The SmartOrg™ engine and records processor established a standardized indexing and charting methodology nationwide. Using SmartOrg™ and My.Ontellus.com, paralegals and adjusters now upload existing records to automate the indexing process with tagging, OCR searchability, cover pages, and bates stamps. The solution was integrated to the carrier's claims system, making records easy to retrieve, locally stored, and safely sharable. As records are securely transferred across systems, key index field information is also transferred.

Result: Consistency & Transparency Enables Analysis

Today, the carrier's adjusters and outside counsel across the country share records that are consistently indexed and review-ready within 24-48 hours. With speed and uniformity, medical examiners, in-house physicians, attorneys, and adjusters can accelerate time-to-analysis. Using SmartOrg™, the company processes an estimated 6,000 sets of records annually, bringing status transparency to claims and case management. As a result, collaboration is stronger. Adjusters no longer rely on law firm staff to pass on records obtained during the discovery process—they have real time information access as the claims transitions into litigation. Adjusters also trade records management work for more time evaluating cases, adjusting reserves, and engaging counsel in case strategy.

“When our client asked for consistent records indexing across the board, Ontellus delivered,” said Cynthia Ledlow, COO, Ontellus. “Records are now organized enterprise-wide, enabling both adjusters and attorneys to gain insights faster and accelerating case strategy.”

INDUSTRY: Insurance – Medical Malpractice

SOLUTION: SmartOrg™

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-Cynthia Ledlow,
Chief Operations Officer,
Ontellus