

Medical records technology key for smaller PI firms punching above weight

Little efficiencies, when amplified over hundreds of thousands of documents, can save real time

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When running a successful — and compact — personal injury firm, it comes down to three things: searchability, portability and transferability.

“On the data management and file management side, having all your evidence in an electronic format is where most of your efficiencies lie,” says Darcy Romaine, trial lawyer at Boland Romaine LLP, adding that finding those efficiencies in the firm’s operations at some point becomes “a game of inches.”

“You want to remove friction from the system, so you’re looking for little efficiencies where on the one-off it might not seem like a big deal — but when it’s amplified over hundreds of thousands of documents you can save some real time.”

Medchart, a comprehensive solution for medical record exchange, ties right into that by reducing the clerks’ workload significantly.

“It’s those inches, as the volume of documents we get is quite overwhelming,” Romaine says. “Medchart is the hunter-gatherer for your medical evidence — it really simplifies that process for you.”

Philip Pollack, founding partner at Pollack Tsimerman LLP, says after establishing the premiere client contact people — the lawyers — and hiring personable, confident and intelligent law clerks and administrative assistants for support, you have to ensure the firm is run “in an advanced, high-tech operation model such that you don’t need the old-school way of writing letters and waiting on regular mail to get things done for the client.” That’s where things like

Medchart come in, he notes — “in that third prong of how we handle our clients’ files.”

The platform offers an efficient and effective way to obtain medical records in a fast-paced environment, and the classic concept of having a client’s file “literally in an accordion in a cupboard or a shelf somewhere at a law firm consisting of thousands of pages of medical records, legal pleadings and correspondence” is now an outdated one, Pollack says. Those documents can exist virtually whether it’s on the cloud, in a directory or in some type of software — you no longer need the paper file “taking up three spots on the shelf collecting dust.”

Pollack says the business of law is “slowly doing away with that world and that old-school approach,” and the COVID-19 pandemic really drew a line between firms that were proactively pro-technology, and ones that were begrudgingly keeping with the times.

“I believe firms that were best set up virtually and best set up technologically are the firms that have succeeded in the COVID world — you have to learn and adapt to how to be a good client advocate both when dealing with the client directly and opposing legal counsel in a virtual world.”

Pollack’s firm was only a few years old when the pandemic hit, and if it hadn’t invested in forward-thinking technological tools to run clients’ files and cases just as effectively and efficiently virtually as from the office, it could have crumbled from the challenges that arose. While it was impossible to predict this type of event at the planning stages, “when you surround yourself when the right people, the right technology and the right approach — you figure it out,” Pollack says.

“Even in a pre-COVID world — and ultimately in a post-COVID world — I don’t think the brick-and-mortar, old-school law firm is the successful approach, particularly in the space of personal injury,” he says. “You want to be the type of firm that’s able to adapt, the type of firm that’s able to change, and the type of firm that’s unfazed by even the most unpredictable type of events like COVID-19.”

Romaine agrees, noting the world’s not going backwards.

“Trying to run as small a footprint as you can is an important factor — it’s truly critical,” he says.

Both Pollock and Romaine also note great technology is not enough. You need the people piece of the equation to leverage it most effectively, and the team behind the tool is just as important as the one at the firm using it. Romaine calls Medchart leaders in the field because it’s run by “an ingenious group that is very open to feedback.” One refinement Romaine requested had to do with OHIP

summaries, a document that lists all the health-related visits a client has had. It’s a critical part of standard production and offers a helpful bird’s-eye view, but the problem is doctors are coded — Dr. 0101325 and not Dr. Sam Smith, for example — and the accompanying legend makes cross-referencing to figure out names tedious.

“What Medchart did was use character recognition to scan the OHIP summary and provide it in an Excel table with the codes switched to names,” Romaine says. “Now I can filter it, I can sort it, I can throw it into pivot tables — I can use all the tools to splice out the data. Rather than an inert, chronological document, it’s an articulate, dynamic document.”

Much like the firms they service, legal tech companies need that ability to adapt to challenges and pivot offerings to suit the needs of the client — that’s the common denominator that keeps businesses of all stripes ahead of the pack.

“The more Medchart innovates, the further ahead they’re going to stay,” Romaine notes.