Highmark Inc.

Project Snapshot

Consolidated records series from 4000+ to 373

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67% inventory reduction

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100 terabytes deleted, $433,000 saved in annual storage costs

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100% participation and pass rate for employee training

Summary

Highmark Inc. is a national, diversified health care partner serving over 5 million members across the United States through its businesses in health insurance, dental insurance, vision care, and reinsurance. To establish a records management strategy that would ensure all its records were managed in accordance with business, legal, and regulatory requirements, Highmark Inc. partnered with Zasio Enterprises.

Objectives

- Implement an enterprise-wide records management program complete with governing policies
- Create a records retention schedule
- Design an all-employee records management training course
- Provide direction in procuring an electronic records management solution

Solution

Prior to engaging Zasio Enterprises, Highmark did not have a formal records management program. Records were being managed inconsistently from one department to another. In most instances, everything was being retained permanently, including email. Even when not required by a specific regulation, both the paper and electronic versions of the same record were retained. A listing of record series and their retention periods existed for offsite storage, however, destruction was never authorized. Needless to say, this made recordkeeping very costly and a risk-nightmare.

To tailor a program that would remedy the issues and to best fit Highmark's diverse business needs, Zasio consultants conducted extensive interviews across the enterprise. They met with Highmark's high-level stakeholders, as well as departmental subject matter experts. These information-gathering sessions enabled Zasio to develop the following solutions:

- A corporate records management policy applicable to all formats of records

- A process-based retention schedule that applied business, legal, and regulatory retention requirements

- A uniform retention period for all email

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- A training course that was added to mandatory corporate training for all employees, including new hires

- Unbiased and impartial assistance with creating an RFP for an automated electronic records management solution

- A top-to-bottom records management program complete with policies, processes, and roles necessary to manage the program independently

- Through Zasio' s guidance, Highmark successfully procured and implemented an electronic records management application that effectively applies Highmark's retention schedule, manages legal holds, and issues disposition for over 2 billion structured and unstructured electronic records

Results

Highmark was more than pleased with the Zasio partnership, as positive results were immediate:

- The new retention schedule consisted of 373 consolidated record series, compared to the over 4000 record series reported to offsite storage

- Offsite paper destruction was implemented, reducing the inventory by 67%

- A 3-year uniform retention period for all email was adopted; over 100 terabytes were deleted, saving $433,000 in yearly storage costs

- 100% of the employees participated in records management training and they all passed a required test assessment

About Zasio

Zasio has over three decades of service in Information Governance. We focus on one thing, helping businesses not only get started in records management but maintain top-of-the-line Information Governance (IG) programs. Since we started in the industry, we've recruited a team of experts, including software developers and technicians, attorneys, analysts, Certified Records Managers (CRMs), Information Governance Professionals (IGPs), and Certified Information Privacy Professionals (CIPPs)—all in-house—who not only keep up with evolving IG trends, but who can also scale our Versatile solutions to meet the demands of both customers new to records management and seasoned veterans. It's no wonder why thousands of companies, including half of the top 20 Fortune 500, have trusted our software solutions and expert consulting services to implement world-class Information Governance programs.

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