opentext™

Success story

Industry
• Government

Solution
• OpenText™ Brava!™

Results

Secured safe and efficient sharing of records with public and partner agencies
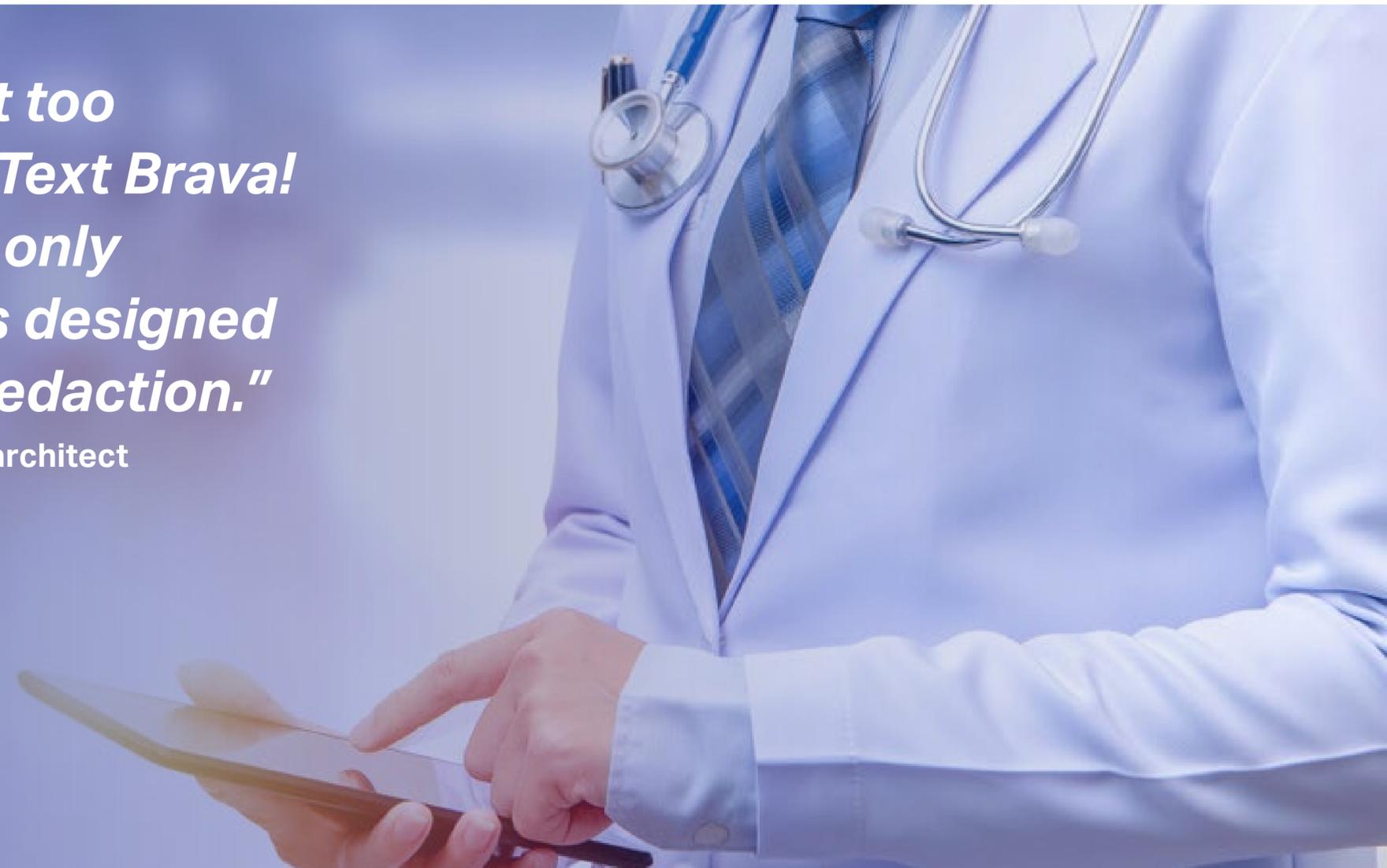
Diminished paper storage and related costs

Improved turnaround time for public disclosure requests, reducing backlog by one month

State health agency reduces record backlog

Department of Health increases responsiveness while safeguarding information with OpenText Brava!

"Redaction is just too important. OpenText Brava! stood out as the only product that was designed specifically for redaction."

Configuration management architect
State Department of Health

A State Department of Health (DOH) receives a high volume of requests for public records from citizens, the media and public interest groups. Among other records, requested information may include:

- Investigative records on compliance with licensees, doctors, pharmacies and hospitals.

- Federal surveys conducted for ambulances, hospices and hospitals.

- Death certificates and birth records.

- Attorney-client privileged work.

- IT information related to infrastructure security.

To complicate the issue, agencies, such as the DOH, must provide records while complying with state and federal privacy regulations, including the HIPAA (Health Insurance Portability and Accountability Act) Privacy Rule and state Privacy Act laws which require that they redact certain types of information. Agencies can come under fire, and costly lawsuits, for failing to either disclose records or inadvertently releasing exempt information.

The DOH receives about 1,500 records requests per month and each request could require redacting anywhere from five to 1,500 pages. When a request came in, employees would generally print out the document, use a black marker to block out confidential material, then copy the marked up record before releasing it to ensure the text was fully obscured. If they needed to send an electronic file, they would then scan it back in and attach it to an email. Not only was manual redaction time-consuming, it created a large amount of additional paper, which added to the cost of handling and storing documents in accordance with records retention policy.

In addition to these external requests, the DOH must share data with other agencies. Employees remotely log in and the department has data sharing agreements with other state agencies, the state patrol and local health jurisdictions. Accessed documents could contain confidential data, so the DOH needs to ensure these records are redacted, even if they are not part of a public disclosure request.

The DOH decided to implement electronic redaction to increase efficiency and responsiveness while still safeguarding sensitive information. After exploring different software products, the agency selected OpenText™ Brava!™.
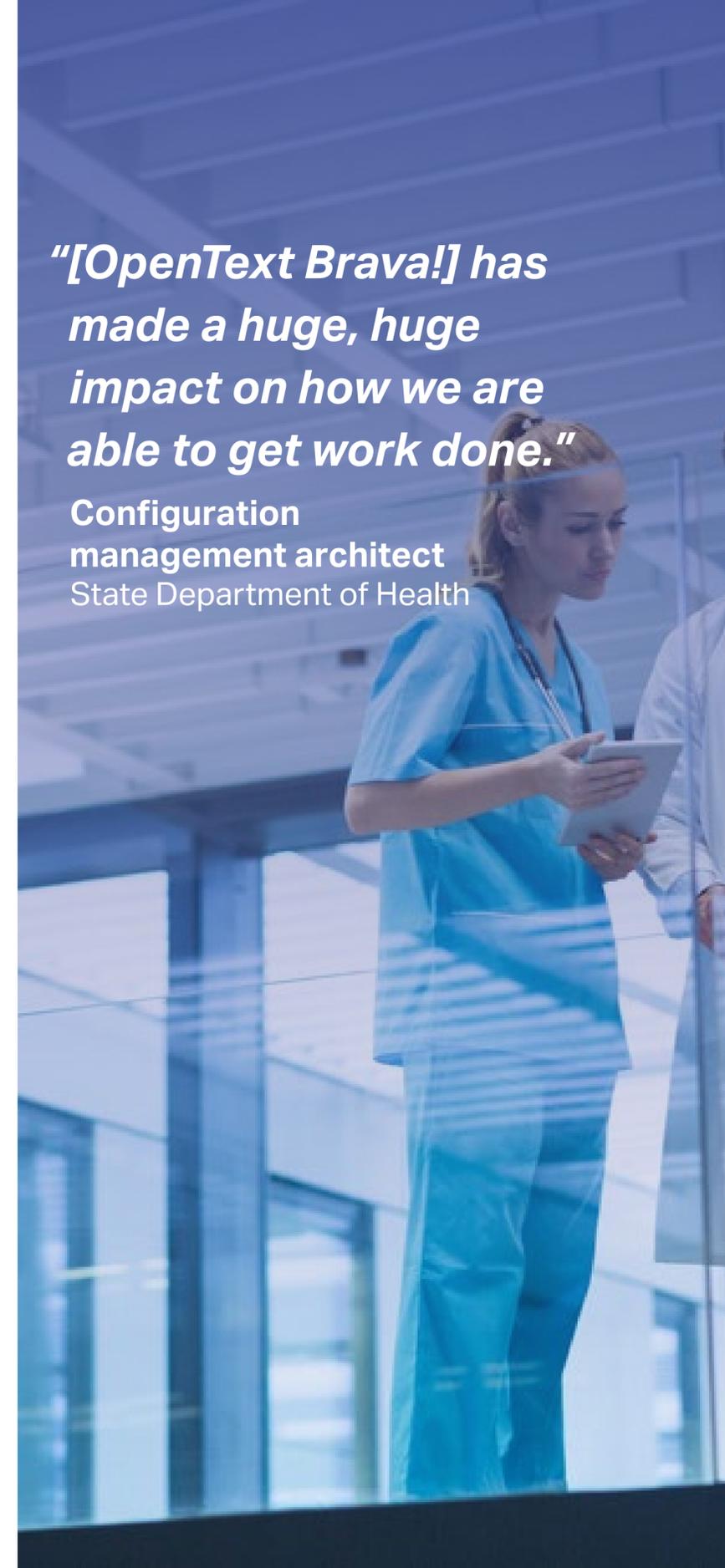
"What I noticed was that with a lot of other products, redaction wasn't the main feature or functionality of the software," said a configuration management architect with the DOH. *"Redaction is just too important. Brava! stood out as the only product that was designed specifically for redaction and that made a huge difference."*

Brava! supports virtually any document type, including PDF, TIFF, Microsoft® Word and Microsoft® Excel® and Microsoft® Outlook® emails (MSG), and is available with OCR for TIFF and PDF. Redactions can be applied by simply dragging a box around an area, selecting text, searching for text strings or via pattern matching (using regular expressions).

The DOH does not usually work with standard forms and many records contain handwritten notes, so employees typically rely on a "read and redact" process, which can be slow and tedious when done manually with paper and marker. Now, they use Brava! functionality to cover handwriting and select a word, name or other sensitive data and have it simultaneously redacted through the entire report.

"[OpenText Brava!] has made a huge, huge impact on how we are able to get work done."

Configuration management architect
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Because the PRA requires that agencies cite reasons for any redactions, such as "Privacy Information," the DOH uses Brava! codes to cite the nature of the confidential material. These reason codes appear on the finalized redaction boxes and can also be appended as a reason log to the end of the document. Brava! creates fully sanitized TIFF or PDF renditions of the original document for safe, easy distribution.

For cross-departmental sharing, Brava! lets the agency create redaction renditions of records that are safe for sharing online. The configuration management architect described a recent scenario in which research was being conducted to determine the number of out-of-state patients undergoing a certain medical procedure in the state. With Brava!, the DOH shared the number of patients but none of their personal or health information.

In all, Brava! makes it easy for state agencies to safely release public records, meet data sharing agreements and comply with records retention policies.

"We have so many staff who are using Brava! because of the high volume and the complexity," said the DOH employee. *"We've been using Brava! for about a year and a half and it has made a huge, huge impact on how we are able to get work done."* Initial return reduced the DOH backlog by close to four weeks.

Following deployment, the DOH gave OpenText feedback on how Brava! could be an even better fit for their business needs. OpenText responded by adding additional reporting capabilities to the software. *"I really appreciate that OpenText listens to our needs and then actually designs the additional functionality that we need,"* said the DOH employee. For rolling out the tool to DOH employees, she referred to several well-designed learning tools. *"The 'HelpTool' is incredibly useful,"* she noted. "I took everything I used for training right out of there."

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit opentext.com.

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