

Secure, yet simple, document workflows in healthcare law

With ShareFile, aequum helps patients fight excessive medical charges

With healthcare costs always on the rise and surprise medical bills causing significant distress to many, some families are forced to seek legal counsel to fight unreasonable medical charges.

aequum, through their relationship with [Koehler Fitzgerald LLC](#) (a national law firm), serve third-party administrators, medical cost management companies, stop-loss carriers, employer-sponsored health plans and brokers nationwide, defending medical balance bills and delivering savings to employer-sponsored health plans. They help manage and reduce risk to self-funded health plans by protecting, advocating for, and supporting patients and dependents. This requires large amounts of documentation to be shared between various bodies, aequum, Koehler Fitzgerald, and their partners and clients in a reliable and secure way that is compliant with the Health Insurance Portability and Accountability Act (HIPAA).

The practice started when Koehler Fitzgerald decided to start defending patients from medical billing claims against providers. In 2020, they officially separated off into aequum, with the two sister companies still highly integrated and sharing some common challenges, such as document storage and sharing.

Significance of time advocacy

File sharing and document collaboration with clients and external parties was a challenge for aequum. “We went through a couple of different methods and vendors,” says CEO of aequum and Co-Managing Partner of Koehler Fitzgerald, Christine Cooper. “We settled on an in-house solution, but that came with certain issues including server downtime and access when outside of the office. Anytime a server is down or inaccessible, obviously we have a delay in what we can do and of course collaboration barriers caused by those.”

To address the need for a safe, secure, and easy-to-use document collaboration solution, aequum searched the market for a suite that would replace their current complex cloud setup with unreliable links, VPNs, and multiple steps for file access. [ShareFile](#) fit their needs for security and compliance and gave them flexibility they hadn’t had before. Cooper says: “We chose it because of its simplicity and the number of ways that we could use it. It really fit our needs and (...) allowed us a very quick way to provide some additional automation.”



Industry

Legal Services

Location

Ohio, USA

Products

• [ShareFile](#)

Using ShareFile and its native, integrated e-signature functionality offered immediate time savings over the length of each patient's case. "Every client has to sign an engagement letter and a HIPAA authorization form," says Cooper. "Many other documents may need to be signed or submitted too. Using ShareFile's signature workflows is a great way to deliver these agreements and get signatures digitally, because it can all happen in 15 minutes versus using paper-based processes, which can take one to two weeks to complete." And the savings are not just the immediate upfront time savings, but over the length of the patient's case.

The firm has also been saving money in unexpected ways. Things like postage can add up to a significant figure. "You can imagine the time savings when you're printing documents, folding them, stuffing envelopes, putting the postage on," says Cooper. "We've had more than 12,000 claims at this point. Every one of those claims generates mailings to providers, collection agencies, clients, and partners. The more we can do electronically through ShareFile, the savings become significant both from time and postage savings."

Better counsel with automation and integration

When aequum's partners refer clients to the firm, they can share the documentation in several secure ways. A portal on the firm's website allows its clients and partners to drag and drop documents and provide some information about who is sending it and who needs to be contacted. Cooper comments: "They go automatically into a mapped-out ShareFile folder that gives everybody who needs to know a notification that the document has arrived. ShareFile automatically files it where we need it. I love the automation. It's key to what we do and really helps the efficiency of our processes."

Another method to share files with aequum is through a link in each employee's email signature specific to a ShareFile folder that belongs to them. "We can route documents out of there, based on name or other criteria. We use this across the board. It's the fastest, easiest way for us to receive and share documents securely without complicated barriers."

ShareFile integrates seamlessly with aequum's systems—including Microsoft Outlook and the company's databases—and its HIPAA-compliant nature means that data is protected even if shared by email. "Being able to simply encrypt emails and documents has been immensely helpful given the confidentiality our documents hold. ShareFile provides push-of-a-button-type encryption and safe sending."

Defending better communication

Communication with clients and partners is now faster and much more efficient, with file sizes and access no longer causing problems. "With ShareFile, if somebody has two GB of data they need to get to us, they just drag and drop," says Cooper. "In the past, we had issues with partners trying to send us something and we would never receive it. It was just too big for their system to send out and our system to receive."

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Christine Cooper, CEO of aequum and Co-Managing Partner of Koehler Fitzgerald

Most importantly though, better communication means better relationships with partners and clients. Partners and clients share a lot of information with aequum, so fast communication can offer peace of mind and satisfaction. Cooper comments: “We work very hard at building client relationships and not everyone is tech savvy. ShareFile gives us an opportunity to deliver a consistent, fast, easy, and transparent experience that helps support our commitment to our clients and our partners.”

No delays in document handling or getting the answers they need means that patients can have one less thing to worry about.

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Christine Cooper, CEO of aequum and Co-Managing Partner of Koehler Fitzgerald

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