



Medical Record Retrieval for Legal Investigations

Industry: Legal

Client: Law Firm

Challenge

The client required a reliable partner to manage the complex and time-sensitive process of retrieving medical records for medical malpractice investigations. This process involved far more than simple follow-ups – the team needed to:

- Assist clients in completing authorization forms.
- Submit and track requests through email, mail, and online portals.
- Conduct regular check-ins and guide clients when contacting medical facilities.
- Navigate multiple workflows to secure records quickly and efficiently.
- Coordinate document delivery to the firm once records were obtained.

For escalated, urgent, or time-sensitive cases, the partner also needed to communicate directly with facilities to guarantee records were retrieved within mandatory deadlines. The client needed a team that could manage these responsibilities with accuracy, urgency, and a strong commitment to client experience.

Solution

TOG deployed a specialized team fully dedicated to strengthening and streamlining the medical record retrieval process:

Focused Team Structure

- 7 full-time agents dedicated exclusively to medical record retrieval.
- Team strategically located in Belize, providing nearshore accessibility and strong communication skills.
- Multichannel support via SMS, email, and phone, ensuring clients received assistance through their preferred communication method.

High-Touch Client Assistance

TOG structured the workflow around guiding clients through every step required in a malpractice investigation. Agents supported clients with completing authorization forms, navigating facility processes, and understanding timelines – all while maintaining the firm’s reputation and delivering a respectful, empathetic experience.

Process Ownership & Escalation Management

For urgent or sensitive cases, the team engaged directly with medical facilities to meet strict legal timeframes. This hands-on approach ensured records were obtained as fast as possible and that case staff were continually informed of status updates.

Results

TOG's commitment to consistency, accuracy, and client rapport delivered strong and measurable value for the firm. The team's proactive communication and dependable execution led to:

Successful weekly retrieval of medical records, ensuring the firm had the documentation needed for ongoing casework.

Improved client experience, reflected in strengthened rapport and smoother interactions throughout the process.

Expanded partnership, including increased headcount and the assignment of additional lines of business such as scheduling.

Enhanced case support, as TOG's detailed reporting helped case staff identify when additional records were needed.

Growing caseload, demonstrating attorney trust in TOG's reliability and long-term performance.

Conclusion

Through a structured operational approach, clear communication, and deep ownership of the medical record retrieval process, TOG proved to be a dependable and strategic partner. The collaboration strengthened the firm's workflows, enhanced client experience, and supported the growing demands of medical malpractice investigations – reinforcing TOG's role as an extension of the client's team.

Experience **The Guru Way:**
Better, Faster, and More
Efficient CX

20+

Years in Business

4500+

Total # of agents
across all locations

80+

Clients Across the
United States

4+ years

Avg. length of client
relationships

Global Footprint



Belize



Dominican
Republic



El Salvador



Philippines



United
States

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