



## **CUSTOMER STORY**

# **How ChartSwap Delivers Faster, Smarter Medical Record Discovery**

**Company:** ChartSwap

**Type:** Healthcare Technology Platform

**Success:** “We didn’t fit inside the box for Inovalon, but they were willing to go out of their way to partner with us and truly innovate to create something completely new.”

[ChartSwap](#), the leading technology platform for medical record exchange, processes more than 2.7 million records a year. Until recently, their legal customers faced a common challenge: relying on a patient’s memory of encounter dates, locations, and providers.

That guesswork often left major gaps: critical visits went undiscovered, attorneys lacked the full picture of a client’s medical history, and cases dragged on without the evidence needed for timely, fair outcomes.

ChartSwap saw an opportunity to change that. They set out to build something the industry had never seen before.



# Finding the Missing Pieces

To move beyond the limits of traditional record retrieval, ChartSwap needed a partner with both the data reach and the technical flexibility to power an entirely new approach.

That's where Inovalon's DataStream® Medical Record Location came in.

Medical records requestors often lack the key details necessary for successful record retrieval. DataStream Medical Record Location's API flags records that requestors didn't know existed, delivering critical patient encounter history data that can shape client outcomes.

"It's full-blown innovation," said Nate Kelly, President at ChartSwap. "Now we can search across a larger subset of U.S. healthcare and find additional services that could be meaningful inside of a court case."

For retrieval teams, this was a turning point. Instead of guessing where records are stored, they get faster, more complete visibility into patient care – and stronger cases as a result.



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- Nate Kelly, President, ChartSwap

# From Breadth of Data to Depth of Partnership

For ChartSwap's requestors, the real value comes from getting both the speed and completeness they've never had before.

"We're able to rapidly identify where care was provided and then deliver records at industry-best turnaround times," shared Kelly.

But technology alone wasn't enough. For ChartSwap, innovation also depends on the right kind of collaboration.

Since partnering, ChartSwap avoided the heavy lift of building hundreds of individual provider connections and instead focused on delivering meaningful innovation directly to customers.

"It's the breadth of information as well as the spirit of innovation that comes from the team," Kelly noted. "We didn't fit inside the box for Inovalon, but they were willing to go out of their way to partner with us and truly innovate to create something completely new."



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# Early Wins, Long-Term Potential

Even working with hundreds of thousands of requesters, ChartSwap delivers benefits that legal requestors are quick to recognize.

“We’ve seen an increase in records requested by ChartSwap and our requesters are happier as a result because they have access to more data for their legal proceedings,” said Kelly.

Users now have broader visibility, faster access, and more repeatable success.

Looking ahead, ChartSwap recognizes opportunities to expand this innovation beyond their use case.

“It’s early, but there’s a ton of value created and the results aren’t all in yet, but we’re pretty sure when they tally them, it’s going to be amazing.”



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## Redefining Record Retrieval

Eliminate the wasted time and frustration on manual searches. With DataStream Medical Record Location, you get instant visibility into where patient records are located – so you can work faster, close cases sooner, and move forward with confidence.

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