



*SRS offers a personalized level of service that is very different from our previous records management vendor. They helped us develop and execute a plan to exit an unfavorable situation and used the transition to implement a solution that gave us complete confidence in our national document management strategy going forward.*

*– Amanda Peltier  
Quality Management  
Systems Analyst  
Xtant Medical  
Belgrade, MT*

## VENDOR TRANSITION: IMPROVING ACCESS AND RECORDS STRATEGY

### APPLICATION

Xtant Medical is a publicly traded healthcare company based in Belgrade, Montana. They specialize in the development and manufacturing of surgical solutions that advance regenerative medicine.

### CHALLENGE

Xtant Medical required comprehensive access to their records for various compliance purposes. With approximately 3,650 standard storage units (SSUs) scattered across four locations spanning two states, managing these records posed a significant challenge. Their previous document management vendor failed to deliver timely access to necessary documents and was largely unresponsive, posing a risk to Xtant's compliance efforts.

### SOLUTION

SRS developed a project plan to address Xtant Medical's document management needs effectively. This plan involved transporting records from three different offsite storage facilities and Xtant's Corporate Office to SRS's PRISM Privacy+ Certified secure facility. There the records were sorted and indexed. Xtant Medical's retention policy was applied to identify and destroy records that had already met their retention, ensuring efficient management until all records met retention. The database developed through the indexing process also provided Xtant with the ability to query records and access them digitally on demand, with the average file delivery time of one hour.

### RESULT

SRS's solution improved Xtant's document management practices, giving them confidence in their records management strategy. Unlike their previous vendor, SRS provided transparency into Xtant's inventory, enhancing decision-making regarding inventory management. The implementation of digital access and automated retention streamlined operations, reducing reliance on physical storage and mitigating compliance risks associated with paper-based records. Overall, SRS's partnership empowered Xtant Medical to optimize their document management processes to scale as their business grows.