keena
Healthcare Technology

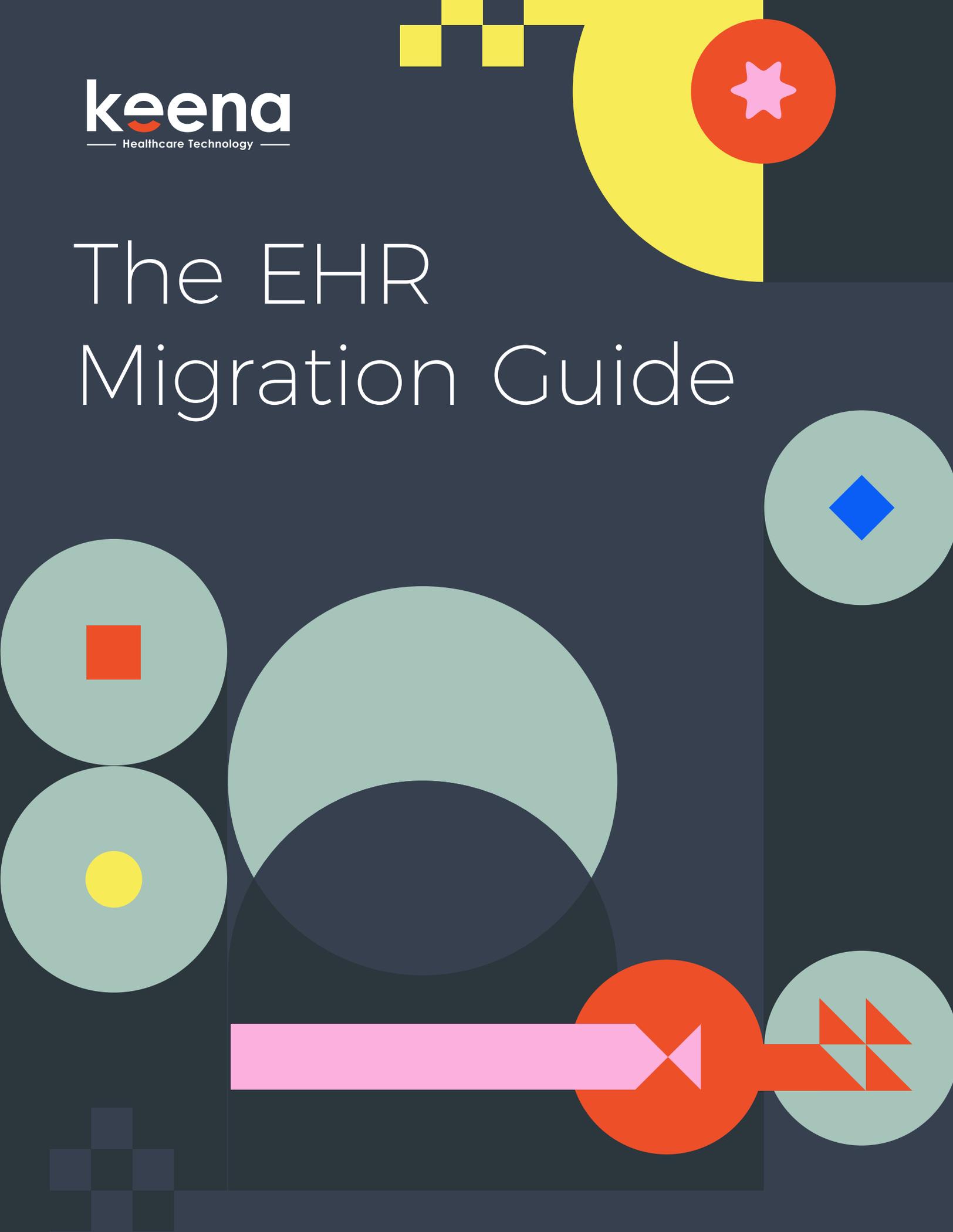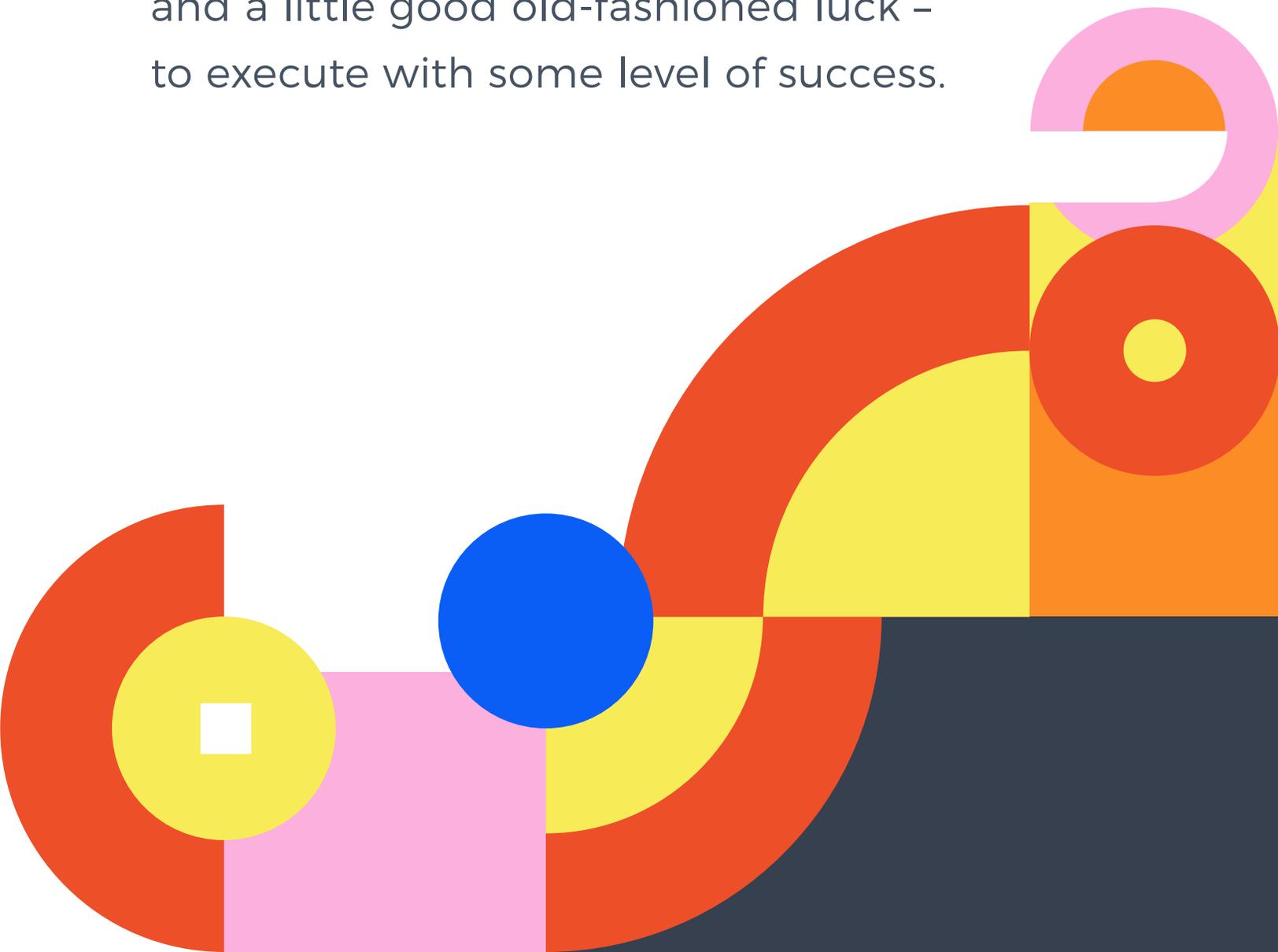# The EHR Migration Guide

Migrating to a new EHR platform
is one of the most complex and costly
IT projects that a healthcare organization
can embark upon. It involves broad
and in-depth operational, financial
and technology planning, support
from experienced third-party experts,
and a little good old-fashioned luck –
to execute with some level of success.

Getting
Started

As we've consulted with so many Keena clients making the decision to move to a new EHR/PM platform we're dedicating a guide designed to support provider organizations facing similar challenges.

How Far Along Are You in the Migration Process?

We've found that provider organizations needing migration support generally fall into one of three categories, each with its own challenges and complicated processes to manage.

01   Initial planning, vendor evaluation and selection

02   Data migration strategy, implementation and testing, and Go-Live rollout

03   Post Go-Live workflow refinement and system optimization

Plan for Resource Challenges

"No matter where the organization is in the migration journey, they face resource challenges."

In the best of times, hiring and maintaining a loyal staff of skilled HIT labor can be problematic. Dealing with a tight labor market while managing an EHR migration project requires quick access to experienced and skilled resources, and efficient training programs- that will allow you to complete mission critical IT projects on time and on budget.

Are too many of your internal staff being pulled into the new system planning and implementation project leaving your day-to-day EHR operations struggling with inadequate support? If so, Keena can provide expert healthcare consultants – many of whom have previously worked for organizations like yours and are managing clients today facing similar challenges.

Support Solutions

Here is a partial list of services to consider planning into your immediate and future health information technology needs:

Helpdesk Services

Offers resources and support needs by taking calls directly from the end users to provide expert level support and ticket tracking.

Backfill Resources for Day-to-Day Needs

Remote resources provided to support and configure adjustments to current EHR or PM system, as needed, freeing up your team to focus on the migration project.

e-Learning Front-End Training Automation

Leverage a proven learning management system (LMS) platform to deliver on-demand, online training programs for any EHR or PM system.

Onsite Go-live Support

We strive to allocate resources that have experience in both your old and new systems to alleviate the demand for internal support at a time of heightened change.
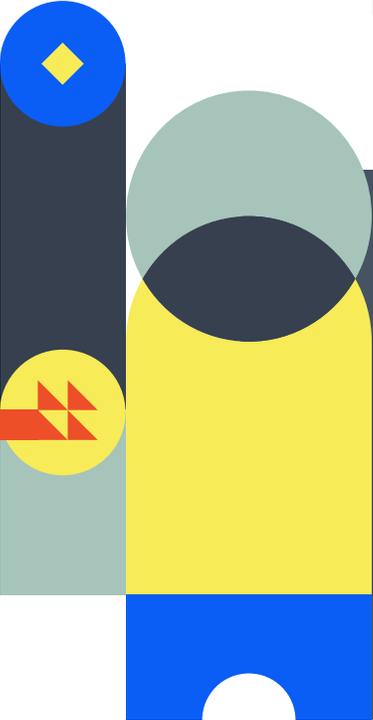
KEENA TIP

"If Doctors Don't Use It, Nothing Else Matters!"

We've found that it's critically important to intimately involve your clinical team throughout the EHR evaluation and selection process to make sure their needs and concerns are heard and documented. This includes having at least one member of the clinical leadership team as a member of your EHR Selection Committee.

01

Initial Planning, EHR Vendor Evaluation and Selection

"As you begin the process of selecting a new EHR there are several critical decisions to consider along with complex operational and budgetary planning."

Since healthcare delivery is in a state of constant evolution, many organizations begin by taking a step back to objectively assess where their current system is falling short and begin to define essential requirements for a new platform. Gathering input from end-users is essential in establishing an updated set of criteria for clinical, financial, operational, and technical capabilities that can be used in the evaluation and selection process.

It is imperative that throughout the selection and planning process to continually revisit your organizations goals and to be able to evolve to meet future needs in running an efficient and competitive healthcare delivery network.

In speaking to provider organizations looking at EHR platform change, we see common issues resulting in excessive operational pain and unnecessary cost drivers.
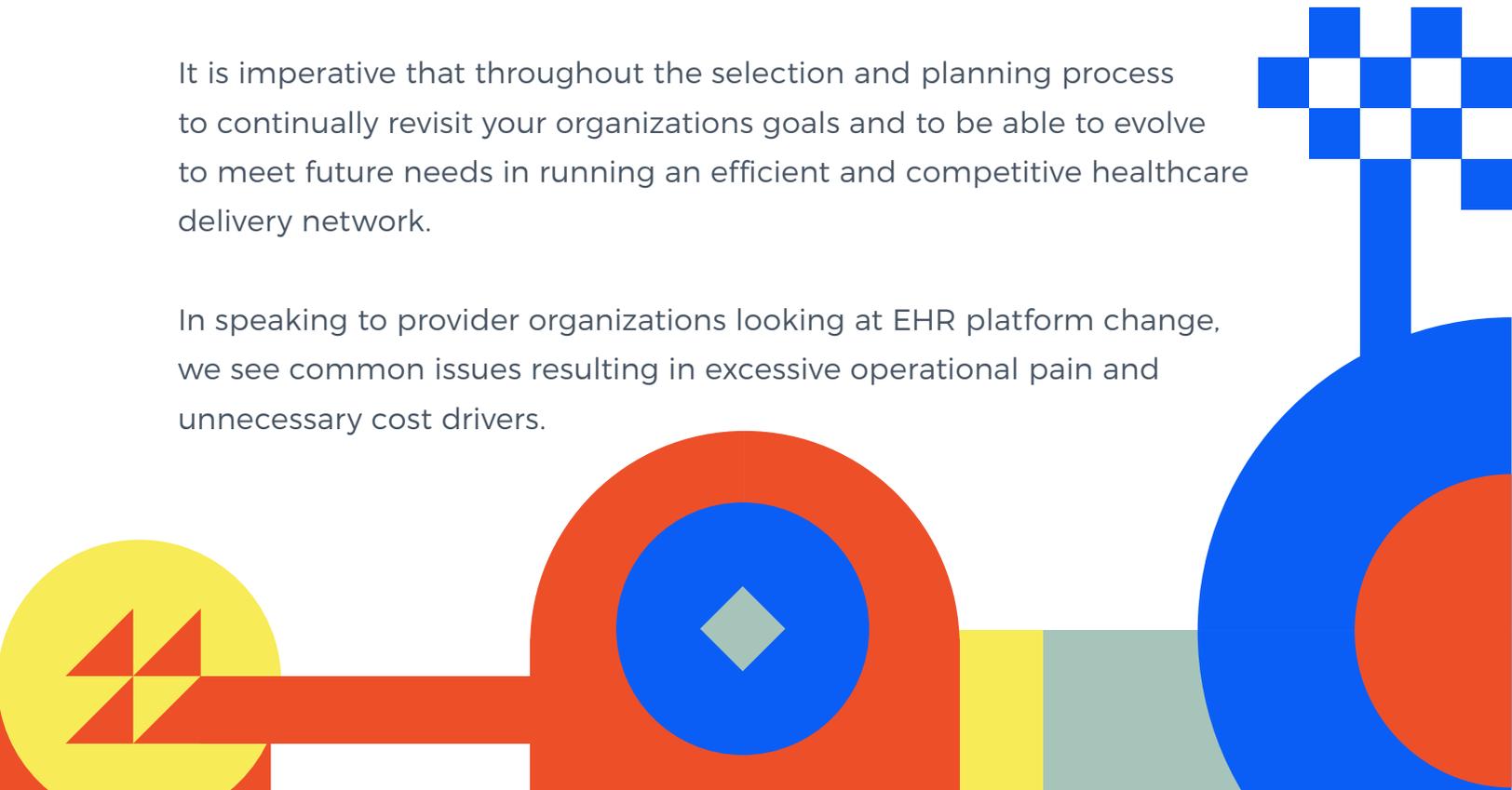
Are Missing Skill Sets Causing Delays?

With staff shortages and some organizations lacking resources with the skill sets required to manage this type of a project, many EHR migrations end up being delayed. Some project teams are pressed into cutting corners resulting in bad decisions, extended timelines, and increased costs. In other cases, an unexpected urgent IT project occurs pulling staff from the evaluation project causing interruptions and delays.

Staff being pulled into EHR planning and selection process can leave day-to-day EHR operations struggling with inadequate support.

Add The Right Resources to Make The Right Decisions and Support Your Projects

Dealing with a tight labor market while managing an EHR planning and selection project requires quick access to experienced and skilled resources, and efficient project templates that will allow you to complete this important project on time and on budget. A properly skilled team will mitigate the chance of making critical wrong decisions that would cost your department dearly.

Support Solutions

Here is a partial list of services to support your immediate and future project needs:

Budget Planning and ROI Analysis
Experienced consultants with the know-how, analytical tools, and ROI expertise to help you objectively make the right decisions for complex budgeting projects.

EHR Evaluation and Selection Service
Leverage consultants with a proven evaluation and selection process, and templates to assist or manage your project. Keena has published an entire whitepaper covering the choice of moving to Epic.

Project Management Resourcing

Timely implementation of migration projects often requires the need for an expert resource to lead the project. Our project management team will evaluate your needs and bring in experienced project managers to make sure your plans stay on course with a successful conclusion.

Backfill Resources for Day-to-Day Needs

Remote project resources to support and configure adjustments of your current EHR/PM platform as needed freeing up your team to focus on the EHR evaluation and selection project, at hand. See a client success story to learn more about how this gets done.

Conversion and Data Migration Services

You are going to need an integration team to move your data from your old system to the new one. We discourage our clients from trying to take this on their own or paying their new EHR vendor for this service as this will slow down the migration process and inevitably cost more money. Start building your integration team during the vendor selection process, this will help scope the project and set realistic timelines and budgets.

3rd party integrators have invested in advanced technology tools and built extensive conversion libraries to get your system online quickly and with less expense. Select a team that maintains strong relationships with leading EHR/PM vendors and have experience with the systems you are converting.

For more information read our sales sheet, white paper, or client success story focusing on delivering these services.

Look to Keena to provide expert healthcare consultants – many of whom have previously worked for organizations like yours and are managing clients today facing the same types of challenges.
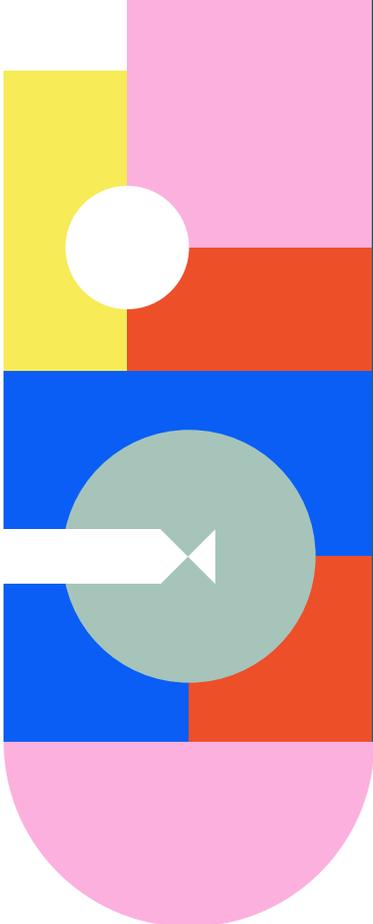
KEENA TIP

Have You Considered Parallel Tracking an Archival Project with your EHR/PM Migration?

Take some time to consider the benefits of running both projects in parallel. You'll find that there is a significant operational time-savings and significant budget/financial savings by running these important projects simultaneously.

Read OrthoCarolina's case study *"A Mission-Critical Data Migration and Archival Project"* to see how the decision to run their conversion and archive projects in parallel saved both time and money.

02

Data Planning, Implementation, and Go-Live

"Data migrations are typically all-encompassing projects that can cause havoc in even the most skilled IT departments with trickle down impacts on physicians, administrators, and other mission-critical departmental staff."
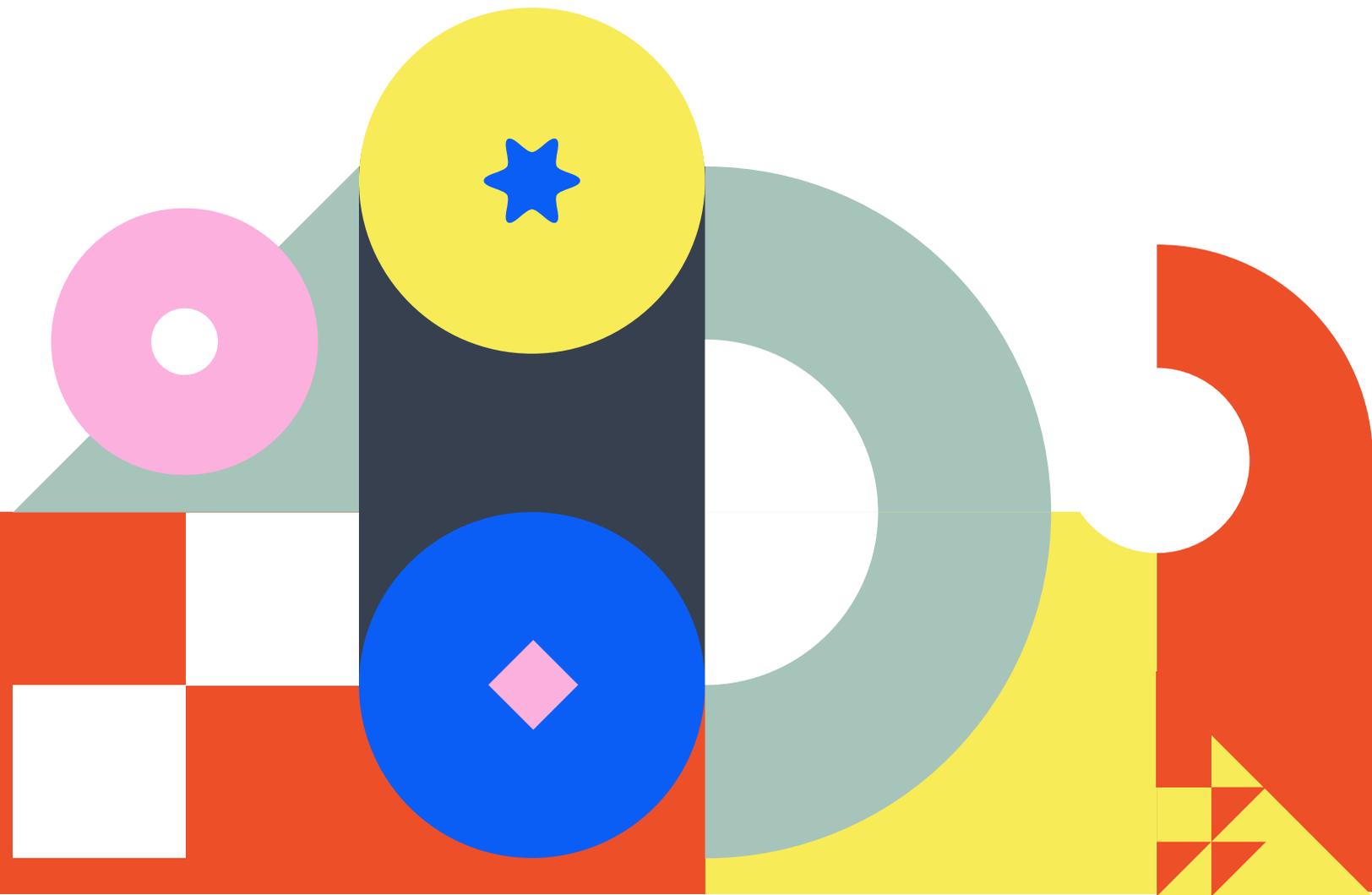
Are Data Issues Further Depleting an Overloaded it Staff?

Here are a few trouble spots that may be familiar if you are in this project phase:

Data Clean-up
Duplicate records, and errant demographic data

Data Elements Selection
Demographics, structured vs discreet, CCDs, progress notes, etc. (converting too much or too little)

Managing Legacy Systems
Integration vs archive vs sunset legacy systems

Project Staffing
Internal vs 3rd party resources, team leaders, multi-disciplinary participants, competing departmental priorities/needs

Maintaining Day-to-Day IT Projects
Falling behind on routine EHR/PM system ticket management and upkeep

Implementing Migration Strategies

There are established migration strategies and processes that improve your chances of a successful EHR/PM platform transition with minimal disruptions, hitting project timelines and budgetary goals.

Here are 8-Steps to consider when planning and executing your EHR migration project.

01 Scope The Project
The first step is all about knowing what you need related to data (elements/quality), project staffing (leadership/multidisciplinary teams) and timeline (realistic project plan/optimal time of year).

02 Select a Conversion Specialist
Almost every organization is going to need additional expert resources

for this project. Look to 3rd parties with experience, ETL workflow tools, references, and reasonable pricing.

03 Build Migration Plan v1.0

As with most complex projects the plan will be dynamic even as work begins. Make sure to address the following important plan elements: what data is to be converted | plan schedule and approach (incremental vs Big-Bang/timeline) | clearly identify resources/responsibilities | define plan iterations.

04 Get Connected

Project managers are often surprised by how difficult it can be to enable 3rd party specialists to gain/maintain access to legacy infrastructure. Plan ahead with required legal paperwork and provide internal staff support as needed.

05 Sample, Test, Validate, Iterate – Repeat

Getting your chosen patient data in the right location in your new system is a dynamic process. It will take several iterations to perfect. It is very likely that the ultimate conversion profile will emerge out of this process. Be patient and work closely with your conversion specialist.

06 Connect Extract with Import

Your conversion specialist will likely prepare an extract file to your EHR vendor for import. Import requirements vary between EHR vendors, so communication of the detailed export specifications is very important.

07 Don't Forget About Workflow

In the end, getting a practical perspective on how the conversion project impacts daily activities—from scheduling, to check-in, to visits, to ordering tests, and finally to billing- is essential. This means understanding the work of the staff that fulfills these functions – not just the physicians.

08 Go Live!

Going live is the culmination of the plans and collective effort of the implementation team. On one level it's like another testing iteration done in a production environment and final chance to refine workflow anomalies missed during testing. Be sure to have your implementation team stand close by during this final step in the process

Want more details? Check out our whitepaper, *"8-Steps to a Successful Conversion Project"* where our conversion team shares a proven process that has been used by Keena to successfully help manage hundreds of conversion projects.

Support Solutions

Here is a partial list of Keena services to support a provider organization in this phase:

Conversion and Data Migration

By leveraging advanced technology, maintaining strong relationships with leading EHR/PM vendors, and utilizing our extensive conversion library, we get your system online quickly and with minimal expense.

Archival Solution

It may not be practical or possible to convert all the relevant clinical and financial data from your old systems to your new. An archival solution like LiveArchive provides easy access to a full view of all archived clinical and financial data from your old systems. There's no need to keep your legacy EHR or PM systems running, along with the maintenance and licensing headaches that go along with that. Read a client success story or more about Keena's Archival Solution to learn more.

eMPI Solution

Keena works to keep your patient information clean and connected. Our Enterprise Master Patient Index (eMPI) software helps you resolve duplicate patient records, while keeping demographic data in check across separate registration systems.

ETL and Reporting

Keena's ETL Solution brings disparate date from isolated systems into a consolidated view. By bringing all your clinical, financial and claims data into a single view you'll be able to create dashboards and scorecards to turn your full data set into meaningful information for clinical and business decisions.

Master Data Management Solution (MDM)

With an MDM solution in place, organizations involved in merger/acquisition processes or exchanging data with HIEs and ACOs, can accurately consolidate information on patient identities and activities, and pool their data into a single database for essential management reporting.
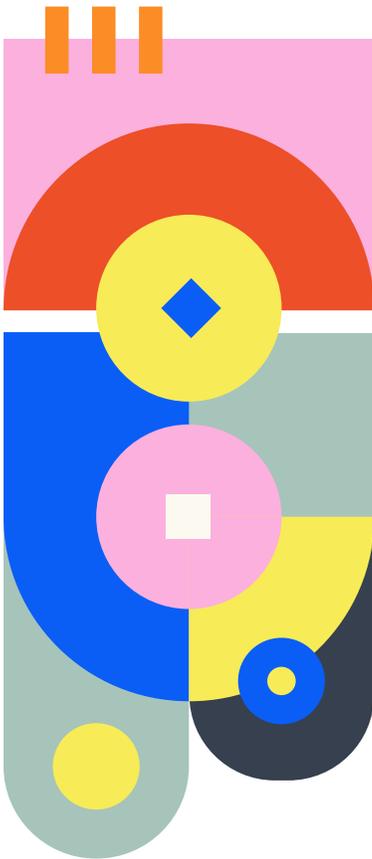
KEENA TIP

If you're considering a move to the Epic platform, our conversion team has written a supplemental whitepaper *"Considering an Epic Conversion? Here's the data you need*.*"* This piece highlights important tips and tricks specific to an Epic migration project.

03
Post Go-Live Planning and System Optimization

"There are several essential post Go-Live matters to consider and manage. If proper planning after initial system training and implementation is not in place, the project can take a sharp turn in the wrong direction."

Your EHR Go-Live date has come and gone. You've done a good job of managing a complex, and arduous EHR migration project. You're feeling a great sense of accomplishment and maybe some relief, but there's a little voice in the back of your mind reminding you to keep alert, keep your eye on the ball. You're not completely out of the woods. Not yet.
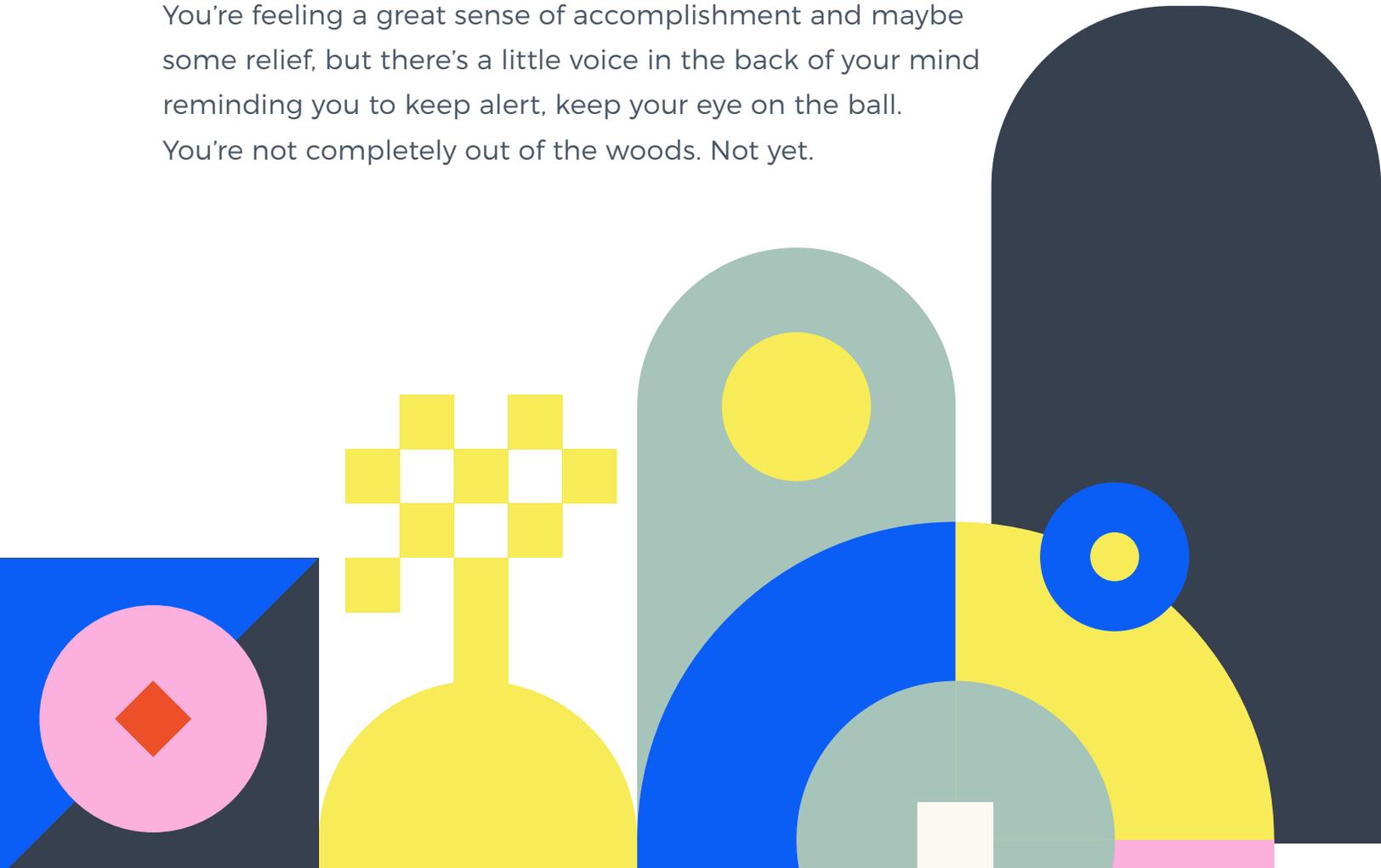
Are You Ready for Go-Live and The Steps Beyond?

When moving to a new EHR, all eyes are focused on the Go-Live project. It's the apex of months, sometimes years of planning and execution. However, if you haven't thought through a few key elements of post Go-Live preparation, you may end up with unnecessary headaches, and a decrease in morale and productivity.

Navigate These Critical Steps

Here are a few common trouble spots that may be familiar to you. By managing your specific situation and planning ahead, you can avoid some of them altogether:

01

Post-Implementation Training and Support Gaps

As you move beyond basic day-to-day system operational tasks, some organizations run into difficulties managing more complex data access and reporting needs required to manage their departments effectively.

An important planning step is to make sure you have an effective internal training team and structure in place and a sufficient external support team (new EHR partner) at the ready to help, as needed.

Key Question:
Do you have sufficient internal and external training and support teams in place to provide the resources required for the expected increase in initial needs?

Important Factors to Consider:
Timely turnover on open tickets; completing user access and system provisioning processes; and, planning for consistent communication as adjustments are made during the early learning days.

02

Network Infrastructure Strains

As more practices and/or departments come on board and begin using the new system, your IT network begins to strain with more frequent down time incidents and slowing system response times.

23% of healthcare leaders worldwide identified IT infrastructure as a leading roadblock to using data effectively.

Key Question:
Have you done a thorough IT infrastructure evaluation and test before rolling out your new system?

Important Factors to Consider:
Work closely with your EHR/PM vendor of choice to make sure you understand the infrastructure requirements needed for maximum system performance and conduct an internal audit to ensure you have the technology required to make a successful transition.

03 System Optimization Shortfalls

Once you've completed your initial training, department staff will likely start to notice reports and processes aren't running as smoothly as with the previous system. There may be disruptions and/or errors in essential 3rd party applications. These disruptions could be related to application incompatibility or interface/integration shortfalls.

Some 3rd party applications and standard plugins are not functioning effectively, and standard and custom departmental reports are not capturing data required to make important clinical and business decisions. In addition, specialty workflows will likely need to be adjusted to leverage your new system.

Key Questions:
Have you taken 3rd party application inventory and contacted your vendors well ahead of Go-Live to plan for potential failures? Have you done an interface audit and planned resources for supplemental post Go Live testing, validation and refinement?

Important Factors to Consider:
Having a skilled and trained workflow team with a clear process in place for identifying and implementing new processes is essential to success. Alerting all critical 3rd party app vendors of your new system and Go-Live dates is also required to ensure any interface adjustments are made ahead of migration. Having integration engine resources available to fix errors as needed will limit critical workflow stoppages and result in a smoother transition to the new system.

04 New Practice Integration Slowdowns

If your organization intends to maintain or increase some level of growth after your new system is live, you'll need to plan for integration training and implement new processes to continue the efficient transition of new practices into your network.

New practice extraction/conversion integration processes have changed and are not running as smoothly as with the past legacy system, impeding system-wide growth initiatives.

Key Questions:
Have you worked with your new platform vendor to determine appropriate skills required or 3rd party resources available to assist in new practice integrations going forward?

Important Factors to Consider:
Plan ahead to determine whether you'll need 3rd party assistance for future integrations or if your current team has the skills and time to make the transition.

Support Solutions

Here is a partial list of Keena Advisory services to support your migration project needs:

Staff Training

No matter the software application or required method of delivery, whether its end-user or IT analyst training or skilled resources to help, our experts can assist in training needs for large project rollouts, EHR/PM end-user training, IT analyst admin training, and more.

Optimization Reviews

Optimization teams evaluate and recommend system efficiency reviews on a regular basis. Through systemic workflow analysis a detailed report of adjustments is provided that lead to an organization working smarter, not harder.

Custom Reporting Needs

Database experts will take your data reporting requests and turn them into accurate, actionable, and effective operational tools. Reporting expertise should include staff productivity, quality and regulatory performance, billing & financial performance, and custom one-off requests.

Automated Account Provisioning

Standardize setup of user accounts while adhering to protocols to seamlessly grant and manage access to your new EHR and PM systems.

Managed Interface Services

Managed Interface Solutions provide an added level of confidence for clients navigating an EHR project. Powered by the QIE (Qvera Interface Engine) this Software as a Service deals with installation, updates, refinement and ongoing maintenance of all your healthcare interfaces.

Through our Advisory Service offerings, look to Keena to provide leading healthcare IT consultants many who have previously worked for organizations like yours and managed clients facing similar challenges. Keena can provide you a skilled and experienced EHR/PM transition team that has successfully assisted scores of organizations through complex migration projects.

With 20 year's experience in the industry and nearly 80 full-time consultants, Keena understands the complexity facing organizations managing an EHR platform migration project.

THE KNOWLEDGE IN THIS GUIDE WAS DERIVED FROM

550	40+	65	300M
Data Extraction and Conversion Projects	Assisted Health Organizations with Conversion to EPIC EHR	EHR & PM Vendors Systems Converted to Data	Combined Healthcare Charts Converted

MIGRATION SPOTLIGHTS

A Complex EHR Migration Project

Keena introduced Mission Cancer + Blood to LiveArchive to have their critical clinical and demographic data preserved and archived for easy access.

Benefits

- Due to effective implementation plan, the EHR migration project was streamlined for everyone involved.
- Opportunity for clinicians to access patient data quickly and efficiently.
- Caregivers quickly had cancer history and treatment regimens at their fingertips.

READ CASE STUDY →

A Mission-Critical Data Migration and Archival Project

Keena's consultants worked closely with OrthoCarolina's IT staff to facilitate a smooth transition to Epic.

Benefits

- Detailed reporting capabilities from any clinical or financial data set in LiveArchive.
- Easy access to flexible, detailed clinical and reporting capabilities.
- Improved quality of care and a better healthcare experience for patients.

READ CASE STUDY →

Epic Migration with ConnectR-to-QIE

Keena quickly migrated a legacy Interface Engine to QIE, keeping mission-critical interfaces operating during a migration to Epic EHR.

Benefits

- Streamlined day-to day administration of interfaces and stabilized IT support needs.
- Provided enhanced and timely access to patient data for the entire organization.
- Improved quality of care and a better care delivery experience for patients.

READ CASE STUDY →

PRODUCT SPOTLIGHT

ARCHIVAL SOLUTIONS

LiveArchive is a vendor-agnostic healthcare data warehouse with intuitive dashboards for full access to all archived patient data. Pull up patient history from your old EHR or invoice directly from legacy financials that were not migrated into your current System. This innovative archival solution will immediately improve your practice workflow. It's like having a mini EHR or PM attached to your archived data, without the hassle or expense of maintaining legacy systems.

LiveArchive Clinical

Access, search, print, save and interact with archived patient medical data from one or multiple EHR systems in a single data warehouse.

LiveArchive Financial

Access legacy financial data from legacy patient financial records for billing, reference and compliance.

LiveArchive Disaster Recovery

Access discreet mission critical and financial data in case of a data emergency.

Set Up a 45 Minute Introductory/Discovery Call for any Staffing Solutions →

Our team will evaluate your project load, staffing requirements and mission critical IT projects to determine the best plan to address your immediate needs.

or

Contact Joshua Luce | Sales Representative
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