



Healthcare's Guide to Medical Data Abstraction

How to migrate legacy EHR data to a
modern EHR system with security, speed,
and continuity.

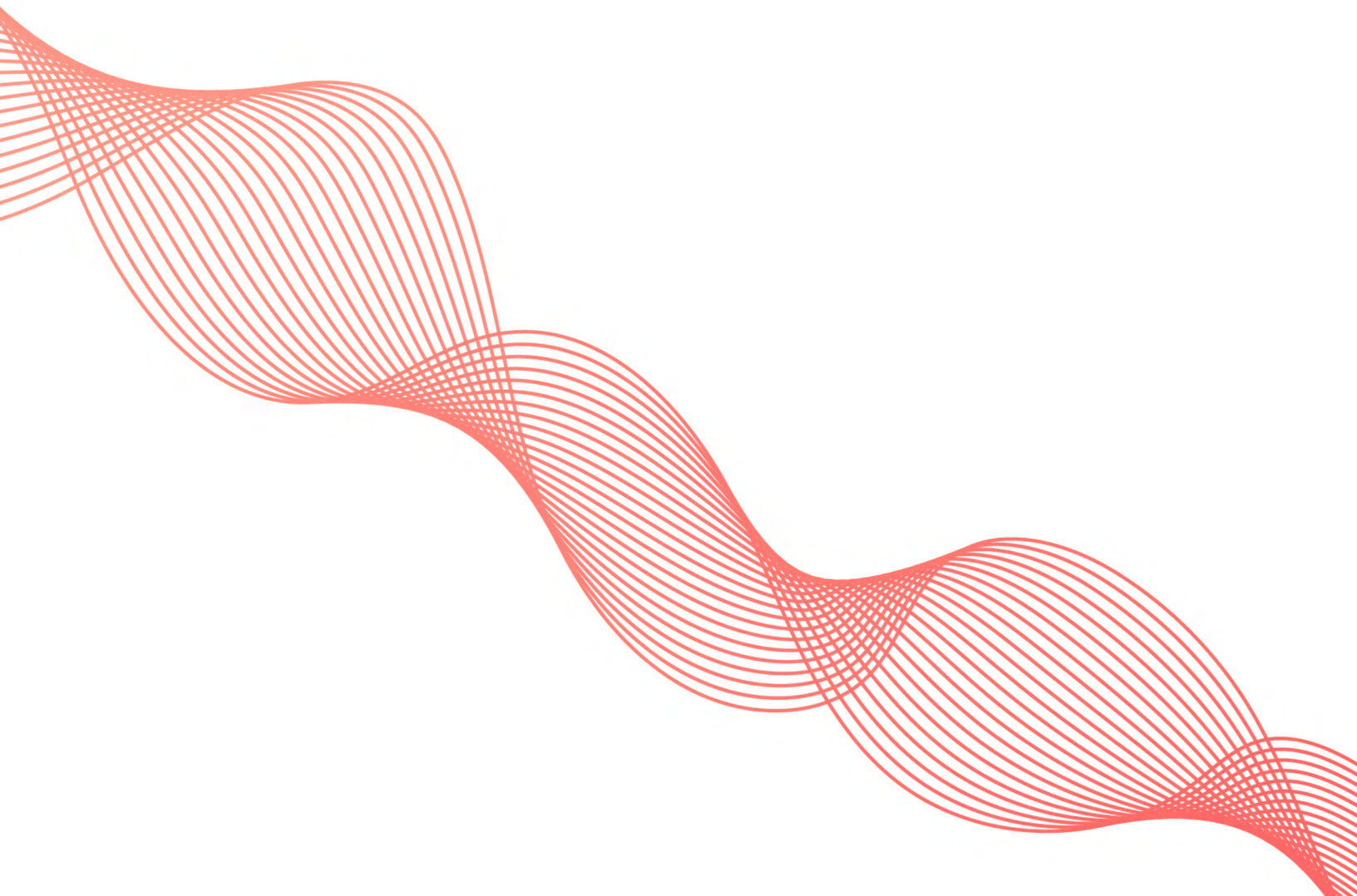


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Your EHR Migration Starts Here

Healthcare organizations of all sizes are increasingly moving from older electronic health record (EHR) systems like Meditech to modern EHR platforms like Epic. Newer systems offer better vendor interoperability, consistent technological development, and the critical ability to standardize workflows and data-sharing across facilities.

But transitioning patient data — a process known as medical data abstraction — from a legacy EHR system to a new one is a huge project. It involves sensitive information, dozens of moving parts, time, money, and foresight.

Whether you're thinking about migrating data to a new EHR system soon, or you're already in the throes of implementation, this guide gives you step-by-step instructions on how to ensure your data makes it there on time, intact, and with zero disruption to the patient experience.

Step 1: Round Up Your Resources

Before beginning your medical data abstraction project, ensure you have all the right resources in place. You will need a roster of people to perform various tasks, and they should all have medical backgrounds or some level of healthcare experience:

- **Project Lead**

At least one stakeholder should bear responsibility for the progress, governance, and completion of the project as well as perform decision-making around the legacy system's phase out and your go-live efforts.

- **Abstractors**

Depending on how many records require abstraction, you'll need several experienced abstractors.

- **Quality Assurance Staff**

It's not enough to simply get the chart data to your new system. You need to verify the records' accuracy to ensure all data is a one-to-one match with the data that was in your legacy system. For this task, you need quality assurance professionals.

- **Reporting Staff**

Assign individuals to the reporting process so you can stay aligned with budget, on top of your timeline, and steadily progressing toward your goal.

PRO TIP:

It is not possible to complete a medical data abstraction project solely electronically. Certain data — such as demographics and billing — can be moved electronically, but for everything else, you need humans with healthcare backgrounds to manually evaluate and oversee the data migration process.

DO:

Consider working with a medical data abstraction service provider that has proprietary software to expedite the secure migration of the right data.

DON'T:

Hand off your medical data abstraction project to your internal office staff. They may appear happy to receive overtime pay to do it, but you risk employee burn-out, inefficiencies, and blowing up your budget.

Step 2: Map Out Your Timeline & Budget

Pinpointing the right time to perform abstraction requires your teams to consider several factors:

- **How Much Capacity Does Your Team Have To Devote To The Abstraction Project?**

If they will be working overtime or on the weekends, factor in those limited hours.

- **Have You Hired An Experienced Service Provider To Do Your Abstraction?**

If so, you can likely hand off the timeline-mapping to them.

- **What Type Of Patient Data Are You Moving?**

It's not advisable to move some patient data early. For example, obstetrics patients come in for weekly visits toward the end of pregnancy — if you move their data too far in advance, you may not have patient data in the right place when they arrive for appointments.

- **When Does The Patient Data Need To Be In The New System?**

A service provider will typically guarantee you'll have your patient data ready to go in your new EHR system two days before the patient's appointment.

Your Budget Is Determined By These Components:

- How many patient records are you moving?
- How much extra pay will you shell out if you are doing abstraction internally?

DO:

Prioritize the abstraction of patient records according to their appointment schedule. The soonest appointments indicate which records should be migrated first.

DON'T:

Start abstraction too early. You could risk missing months of patient data if you begin migrating certain records before the right moment.

Step 3: Evaluate Your Data

You may assume you'll need to migrate every data point from your legacy EHR system to your new one, but doing so is unnecessary, time-consuming, and expensive.

The goal of evaluating your data is to ensure that the most valuable information is in your new EHR system at the time your providers need it — without costing you an arm and a leg to get it there.

Ask the following questions to help you determine which data to bring to your new EHR system:

- **Q: What Data Do We Need In Order For The Patient Visit To Be Ideal?**

A: Identify the data elements your providers need on hand to conduct an efficient appointment without having to toggle between the old and new EHR system.

- **Q: What Data Can Be Moved Electronically?**

A: Whole charts cannot be moved electronically.

- **Q: What Discrete Data Elements Are Necessary For Clinical Decision-Making?**

A: Depending on your practice and the demographics of your patients, you may need to migrate certain elements and leave others.

- **Q: What Discrete Data Elements Are Required For Reporting Or Disease Tracking?**

A: If your organization is required to track certain elements for reporting to state or federal agencies, identify those components for migration.

- **Q: How Many Patient Records Do You Need To Move?**

A: Do you need every patient in your legacy system to move to your new system?

DO:

Consider your patient population when evaluating what data to move. Factors like a patient's vitals may be relevant for abstraction or not, depending on their age, weight, height, and more.

DON'T:

Plan to migrate all your data.

Step 4: Locate Your Data

Once you've identified the data you'll need to move to your new system, it's crucial to spend time reviewing where providers document data in your legacy EHR system.

Two different doctors often record the same information type in two different places, so you'll need to walk through your old system to understand where all the relevant data for abstraction is located.

This step is especially important for multi-location healthcare organizations. Many organizations assume that it will be a straightforward process to move information from point A to point B, but with multiple providers recording notes in multiple locations across multiple facilities, this is never the case.

PRO TIP:

Identify potential vocabulary variations in your records. Don't assume all staff refer to each procedure or diagnosis the same way. You need terminology crosswalks to ensure successful data standardization in your new EHR system.

DO:

Consider working with an abstraction expert that ensures the standardization of your data in your new EHR system.

DON'T:

Assume all your facility locations document data in the same way and in the same places.

Step 5: Perform Abstraction And Quality Assurance

As your abstraction team conducts the data migration, you'll need to implement a quality assurance program to make sure your abstractors:

- **Choose the right patient records**
- **Abstract the information accurately, down to every data point**
- **Prove that the new system's data matches the old system's data**
- **Mark abstraction processes complete to track progress**

Your quality assurance team should:

- **Correct Mistakes As They Go**

So you don't discover an error during a patient visit or have to backtrack.

- **Provide Training to Team Members**

If/when they identify common mistakes or repeated ones.

- **Leverage A Tool or Process**

To track quality to ensure you're meeting goals, identifying repeat issues, and helping team members who struggle.

DO:

Proactively perform quality checks as part of a broad program that ensures data integrity throughout abstraction.

DON'T:

Wait for a patient to come in to see if their data made it to your new system, safe and sound.

Step 6: Track Progress With Reporting

Medical data abstraction may take several months, so you'll need to implement a reporting cadence to:

- **See progress along your timeline**
- **Ensure you're sticking to budget**
- **Stay aligned with your scope**
- **Adhere to reporting requirements**

Depending on your organization and the type of care you provide, you may need to generate certain reports and track certain components to stay compliant.

- **HIPPA Compliance**

Requires you to ensure secure data handling during migration and to report any unauthorized access during the move to your new system.

- **State-Specific Requirements**

May mandate you maintain documentation such as immunization records, so it's critical to track these data elements.

- **Federal Funding**

For your organization may be contingent on providing certain reports to the Centers for Medicare & Medicaid Services, Health Resources & Services Administration, National Institutes of Health, or other.

Consider generating daily, weekly, and/or monthly reports — depending on your compliance requirements, budget stringency, and goal for completion.

DO:

Proactively perform quality checks as part of a broad program that ensures data integrity throughout abstraction.

DON'T:

Wait for a patient to come in to see if their data made it to your new system, safe and sound.

Medical Data Abstraction Is A High-Stakes Project.

Streamline It With An Abstraction Expert Like **Guidelt.**

Doing medical data abstraction internally can result in:

- Poor patient experiences when data fails to migrate properly
- High costs from paying employees overtime
- Employee burn-out before/during a system conversion
- Security vulnerabilities
- Non-compliance risks

GuidelT has specialized experience helping healthcare organizations abstract patient data from legacy EHR systems to modern ones like Epic. **We enable you to convert the right data cleanly, efficiently, on time, and within budget.**

Our abstraction team is 100% staff with medical backgrounds and healthcare experience who understand medical terminology and documentation.

With GuidelT, you:

- Complete data conversion with speed, security, and confidence
- Control cost per converted record
- Continue to provide positive patient experiences
- Stay compliant with clear reporting and documentation

Maximize Your New EHR System While Keeping Patients And Providers Happy.

Get in touch with **GuideIT** for a free assessment of your data and environment. Our experts help you make an abstraction plan that supports clinical continuity and compliance.

