

The Do's and Don'ts of EHR Migration

Lessons From the Leaders

In our 30+ years of experience helping healthcare organizations move EHR systems, we've watched leaders make all kinds of mistakes — and make smart decisions, too. Migrating to a new EHR system is a complicated process that has the potential to dramatically improve everything about your operations and patient care, but common pitfalls can easily derail this critical project.

Here are the top do's and don'ts of EHR migration, according to GuideIT's seasoned team of EHR migration experts:

Staffing

- ❌ **DON'T** assume your internal team can handle the migration entirely in-house. Even if you pay nursing staff or clinical informaticists overtime, you risk employee burn-out, inefficiencies, and budget blow-out.
- ✅ **DO** explore external service providers that guide, oversee, and manage your migration. The right vendor will conduct a free advisory session with your leadership to evaluate your data landscape, provide preliminary guidance, and make recommendations

Data Migration

- ❌ **DON'T** attempt to electronically move all your patient records from the old system to the new without evaluating your data. Certain records should stay behind and others should be prioritized. You need humans with healthcare backgrounds to manually evaluate and oversee the data migration progress.
- ✅ **DO** choose a medical data abstraction service provider that has proprietary software to expedite the secure migration of the right data.

Project Management

- ❌ **DON'T** begin the migration process without a clear roadmap and timeline for accomplishing project milestones and completing waves of data conversion. Without a proper plan — and someone to govern the process — you may end up with missing patient records or disrupted clinician workflows.
- ✅ **DO** outline a blueprint for how and when certain tasks will be done — and if they will be done in-house or by your external migration partner. That partner should also be capable of mapping out your timeline and advising on your overall game plan to ensure waves of work are completed on schedule.

Security and Compliance

- ❌ **DON'T** treat security and compliance as a box to check after the migration is done. HIPAA and other regulatory requirements need to be integrated into every step of your transition — especially when it comes to converting patient records.
- ✅ **DO** ensure your migration partner has experience navigating HIPAA compliance and healthcare data governance. You'll want proactive oversight in each stage of the process — built in from the beginning.

Questions about your EHR migration? [Contact GuideIT](#) to get a free assessment of your environment and custom guidance from senior experts on your transition.